OMES/ISD Procurement Mission

To support the State of Oklahoma Agencies' Information Technology purchasing initiatives by providing outstanding service quality, efficiency, integrity and understanding.

Intro to . . . .

IT Procurement & Purchasing

An IT procurement process, formal or informal, exists in every organization that acquires information technology.

- **Deployment Processes**
  - ✓ Requirements Determination
  - ✓ Acquisition
  - ✓ Contract Fulfillment
- **Management Processes**
  - ✓ Supplier Management
  - ✓ Asset Management
  - ✓ Quality Management

........Robert L. Heckman
Managing the IT Procurement Process

What is IT Procurement?

✓**IT Procurement** -is a series of activities and procedures referring to acquiring information technology. Often IT procurement activities are combined into a single process.

✓**IT Procurement Process** -is one of the key strategic business processes within every organization. It is the way to make the organization better and do its business projects because all necessary products and services are available. The process allows determining requirements for IT systems, communicating with suppliers, administering procuring contracts, managing assets and assuring quality of the products/services procured.

IT Procurement & Purchasing

IT procurement and purchasing activities within the framework of project management are essential to any organization which uses information systems and equipment to drive projects, processes and procedures.

Procurement vs Purchasing
So glad you asked…………..

Procurement -

To define procurement broadly, "Procurement" is the overarching function that describes the activities and processes to acquire goods and services. Importantly, and distinct from "purchasing" procurement involves the activities involved in establishing fundamental requirements, sourcing activities such as market research and vendor evaluation and negotiation of contracts. It can also include the purchasing activities required to order and receive goods.

Purchasing-

The term "Purchasing" refers to the process of ordering and receiving goods and services. It is a subset of the wider procurement process. Generally, purchasing refers to the process involved in ordering goods such as request, approval, creation of a purchase order record (a Purchase Order or P.O.) and the receipting of goods.

……..Purchasing Insight
……..NIGP Dictionary of Purchasing Terms 5th Edition

OMES /ISD Procurement Overview Topics

- ✓IT Consolidation –FAQs (HB 1304)
- ✓What is defined as IT (Information Technology)
- ✓IT Procurement Flow
- ✓IT Procurement Methods
- ✓E-Pro
- ✓Electronic Information Technology Accessibility – (EITA)
- ✓Source Code Escrow
- ✓VPAT and Accessibility

  (Voluntary Product Accessibility Template)
- ✓IT Statewide Contracts

OMES /ISD Procurement Overview Topics

Cont'd

✓ **OMES/ISD Information Gems**

- IT Procurement Pre-Planning

- 115 & ePro

- How to identify IT SW Contracts

- Contracts Purchases Orders & PeopleSoft

- Agency Consolidation-Bridging the Gap

- House Bill 1304 & IT Consolidation

- Helpful Web Links

IT Consolidation (HB1304) FAQs

Question:

Is the approval requirement for information technology under the Information Technology Consolidation and Coordination ACT (HB1304) a $0 threshold or since it says assets, the inventory threshold?

Answer:

Under the act, no state agency shall expend or encumber any funds for the purchase, lease, lease-purchase, or lease with option to purchase, rental or other procurement of any information technology assets without the prior written approval of the Chief Information Officer. In addition, no state agency shall initiate or implement an information technology planned project without the prior written approval of the Chief Information Officer. Copiers are included.

IT Consolidation and Coordination Act (HB 1304) FAQS   Cont'd

Question:

Does the act include maintenance of computer equipment, license, or any other Information Technology encumbrance?
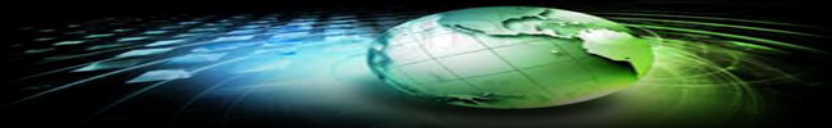
Answer:

Yes, the act includes maintenance, licenses, and any other information technology encumbrance.

Question:

If I need to buy a keyboard for a PC, a desktop workstation, scientific, analytical testing equipment that is computer driven or a copier; am I required to have those purchases authorized by the CIO?

Answer:

Yes

Information Technology

A defining moment

information technology

 -n

IT the technology of the production, storage, and communication of information using computers and microelectronics.   -World English Dictionary

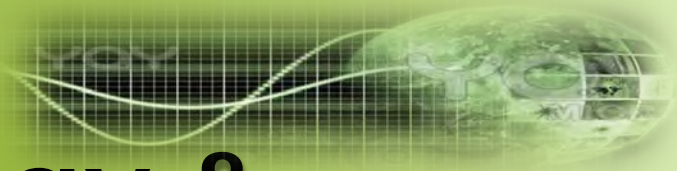# Information Technology

Another defining moment

Electronic and information technology-
Includes information technology and any equipment or interconnected system or subsystem of equipment that is used in the creation, conversion, or duplication of data or information.

 The term electronic and <u>information technology</u> includes, but is not limited to, telecommunications products (such as telephones), information kiosks and transaction machines, World Wide Web sites, multimedia, and office equipment such as copiers and fax machines. *-Answers.com*

What is defined as IT Information Technology &

IT Consolidation and Coordination Act (HB 1304)

Question:

What all is defined as "information technology"

Answer:

Information Technology is defined as any equipment or interconnected system or subsystem of equipment that is used in the acquisition, storage, manipulation, management, movement, control, display, switching, interchange, transmission, telecommunications, or reception of data or information. The term shall include computer, ancillary equipment, software, firmware, and similar procedures, services, including support services and consulting services, software development and related resources.

Technology Procurement

IT procurement methods :

Competitive Bidding Process

- ✓ Informal – *an unsealed bid*
- ✓ Formal- *a sealed bid*

Agency may make IT acquisitions with approved internal procedures on file .

Acquisitions above the agency's dollar threshold are procured by ISD Procurement.

Technology Procurement – Cont'd

- Non- Competitive Bidding
  - ✓ Sole Source
  - ✓ Professional Services
  - ✓ Consolidated Contracts
  - ✓ Emergency Acquisitions

- Negotiated and Established Agreements
  - ✓ Statewide Contracts
  - ✓ OneNet Contracts
  - ✓ GSA Contracts

IT Procurement Flow

- ✓ People Soft Requisition
- ✓ The solicitation's description and scope
- ✓ Detailed specifications
- ✓ Any agency Special Provisions
- ✓ Any instructions to suppliers
- ✓ Evaluation method and criteria
- ✓ Evaluation Scoring Tool
- ✓ Your Suggested Vendor List
- ✓ *All files should be submitted electronically and in modifiable format*

Additional details can be found@ http://www.ok.gov/cio/Procurement/

ePro
E-procurement

- **Purpose**
  - ✓ Paperless requisition process
  - ✓ Easily sourced to PO
  - ✓ Improve tracking of approvals
  - ✓ Electronic document storage
  - ✓ Overall efficiency
- **Agencies are required to:**
  - ✓ Attend ePro training
  - ✓ Who should attend training:
  - ✓ All CPOs
  - ✓ Requestors & Approvers
  - ✓ Accounting

Procedures can be found @ IT and Telecom ePro Requisition Procedures
http://www.ok.gov/cio/Procurement/index.html

Electronic Information Technology Accessibility -*EITA*

- **EITA Standards**

  A copy of the existing EITA Standards can be located on the OSF website at:

  www.ok.gov/cio/documents/isd_itas.doc

- ✓**EITA Clause**

  The EITA Clause used in all IT Solicitations can be located on the OMES website at:

  http://www.ok.gov/cio/Procurement/index.htm

Source Code Escrow
Reference Title 62 O.S§

No State agency, as defined by Section 250.3 of Title 75 of the Oklahoma Statutes, nor the ISD Procurement Division of the Office of Management & Enterprise Services, unless otherwise provided by Federal law, shall enter into a contract for the acquisition of customized computer software developed or modified exclusively for the agency or the State, unless the contractor agrees to place into escrow with an independent third party the source code for the software and/or modifications.

.......People Soft
Standard Comment ID 0290

What is Source Code

Source code is the only format that is readable by humans. When you purchase programs, you usually receive them in their machine-language format. This means that you can execute them directly, but you cannot read or modify them. Some software manufacturers provide source code, but this is useful only if you are an experienced programmer.

.......WEBOPEDIA
IT Business Edge

VAPT

Voluntary Product and ACCESSIBILITY Template

Voluntary Product Accessibility Template or VPAT, VPATs assist in making preliminary assessments regarding the availability of commercial, electronic information products by highlighting features that support the Section 508 accessibility criteria as established by the state.

VPAT forms should be completed by acquisition type Agency should maintain a copy of all VPATs and VPAT checklists.

VPAT
Voluntary Product and Accessibility Template
Cont'd

ACCESSIBILITY

VPAT forms by acquisition type

- ✓ 053-4.3-   Web-Based Internet and Applications
- ✓ 053-4.4- Telecommunication Products
- ✓ 053-4.5-   Video and Multimedia Products
- ✓ 053-4.6-   Desktop and Portable Computers
- ✓ 053-4.7-   Information, Documentation and Support
- ✓ 055-   Accessible Technology Procurement Checklist & Documentation
- ✓ 056-   EITA Undue Burden

 VPAT Procedures and Checklists &

For most of the IT Statewide Contracts Manufacturer VPAT Websites are available.

Forms and additional information can be found at:
http://www.ok.gov/cio/Procurement/index.html

ACCESSIBILITY

Schedule of Reports

The following is a list of reports all State Agencies are required to submit annually, to the OMES Finance's Information Services Division.

July 1st Information Technology and Telecommunications Plan (Includes accessibility compliance reporting) Title 62 O.S. § 34.16.

September 1st Disaster Recovery/Business Continuity Plan(s) Title 62 O.S. § 34.12.

September 1st Hardware, Software, and Communication inventory Title 62 O.S. § 34.1

December 1st Statewide Security Risk Assessment Title 62 O.S. § 34.32.

IT Solicitation Pre-Planning RFP Development

IT Solicitation Pre-planning

It's about providing good quality service with greater efficiency.

Early involvement of ISD IT Procurement is recommended for high dollar and complex acquisitions.

ISD will…………

✓Assist you with developing the solicitation, evaluation tools and any required research etc.

✓Review and discuss agency's timeline to establish a timely completion

✓Provide you with any other additional procurement assistance required

IT Solicitation Pre-Planning
RFP Development
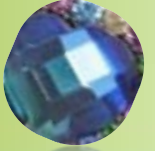
Agencies are encouraged to request an IT Solicitation Pre-Planning with ISD Procurement

When……..

✓The need has been established

✓The expenditure has been verified

✓The expenditure is in the agency IT Budget and on file at OMES

IT Solicitation Pre-Planning RFP Development
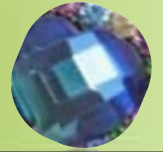
ACCESSIBILITY

Cont'd

Who should the agency involve………..?

- ✓ Agency Purchasing/ Contracting Officer

- ✓ Subject Matter Expert (SME)

- ✓ Administration

- ✓ End User

- ✓ Anyone who will have a vested interested in the final outcome

ePro
E-procurement & Form 115

The OMES form 115 will no longer be required when agencies begin utilizing E-pro.

The OMES form 115 will be required in cases where the item code or category code is not in the IT catalog.

ePro training is required before an agency can access the ePro module.

IT Statewide Contracts

✓IT Statewide Contracts are located on the ISD website at:

www.ok.gov/cio/Procurement/Statewide

✓Statewide IT Contracts are identified by the alpha code "ITSW" followed by the numeric ID number.

Example ITSW0782

Contracts, Purchase Orders & PeopleSoft

Thinking forward……………

Better utilizing PeopleSoft Modules for the intent and purposes for which they were designed.

- ✓ Purchase Orders – issued for one year will use the Purchase Order- function
- ✓ Multi- year Agreements will be generated using the Procurement Contracts function

Bridging the Gap
between processes and productivity

Department of Central Services-DCS

Office of Personnel Management –OPM

Employees Benefit Council- EBC

Oklahoma State and Education Employees Group Insurance Board -OSEEGIB

+ Office of State Finance –OSF
= Office of Management & Enterprises Services

IT Consolidation

The intention of IT Consolidation is to

- ✓ Standardize
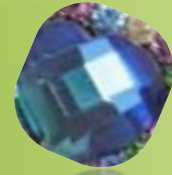- ✓ Centralize
- ✓ Simplify
- ✓ Optimize

IT Consolidations Completed

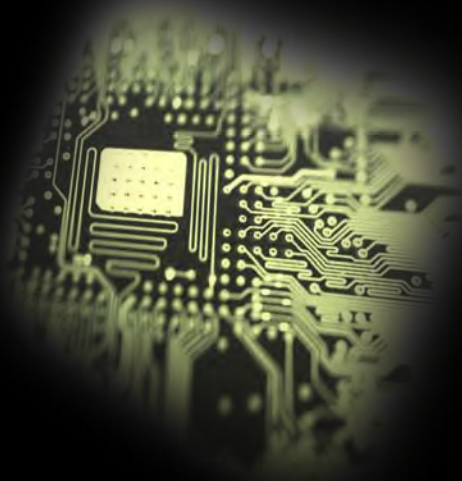|	
Aeronautics	Governor' Office
Abstractors Board	Human Rights Commission
AICCM	Interstate Oil
Anatomical Board	Licensed Social Workers
Arts Council	Long Term Care Board
Banking Department	LP Gas Research, Mktg. & Safety
Board of Nursing	Commission
Building Bond Commission	Marginal Well Commission
Capitol Improvement Authority	Merit Protection
Capital Investment Board	Motor Vehicle Commission
Commission Consumer Credit	Multiple Injury Trust Fund
Commercial Pet Breeder	Office of Personnel Mgmn't
Construction Industry Board	Optometry Board
Dept. of Central Services	Physicians Manpower
Dept. of Education	Professional Engineers License Board
Dept. Tourism	State Treasurer
Disability Concerns	Teacher Preparation Commission
Employee Benefits Council	Teachers' Retirement System
Ethics Commission	Tobacco Settlement Endowment Trust
Fire Marshall	

OMES/ISD IT Procurement

Helpful web links:

http//omes.ok.gov

http://cio.ok.gov

http://www.ok.gov/cio/Procurement/

http://www.ok.gov/cio/documents/Bid_Process.pdf

https://wiki.ok.gov/display/itprocurement/Home

http://www.ok.gov/cio/Procurement/Solicitations/

https://confluence.atlassian.com/display/CONF35/Watching+a+Page+or+Blog+Post

Questions

You may submit your questions to: **<u>purchasing@omes.ok.gov</u>**