“It’s Complicated:” Technology Procurement at UC Merced

OIT Behind the Scenes

Webinar Series
Setting Expectations

- **Lights!**
  - Camera & Audio

- **Action!**
  - Participatory Activities

- **Camera!**
  - Recorded Session

- **Cut!**
  - Q & A
TODAY’S AGENDA

- Intro to technology procurement
- Most frequent purchase categories & key things to know
- Current state: pains & gains
- How and when to engage OIT for help
Technology Procurement at UC Merced
Tech Procurement: OIT Purchases

Marisela Angel
OIT Chief Administrative Officer
Take A Guess
OIT Technology Procurement Overview

Purchases OIT Makes to Support UC Merced

- Cyber Security
- Network Infrastructure
- Audio/Visual Infrastructure
- Enterprise Solutions
Cyber Security

OIT invests in tools and services that help protect UC Merced users & data.

Examples:

- Firewalls
- DUO Two Factor Authentication (2FA)
- Anti-malware (fights spyware and viruses)
- Phishing review service (Know Before)
- Intrusion detection/prevention system (IDS/IPS)
- Security monitoring services
Cyber Security

Our Process:

1. Security need identified
   - Projects/emerging risks
   - Keep current with standards
   - System-wide mandates

2. Considerations
   - Risk/Mandate against campus and OIT strategic plans
   - Accessibility
   - Type of hardware/software
   - Type of data
Network Infrastructure

*OIT invests in physical equipment and support agreements to keep 10,000+ users connected and productive.*

Examples:
- Routers
- Network switches
- Wireless access points
- Service agreements with vendors
- Monitoring services
Network Infrastructure

Our Process:

1. Network need identified
   - Campus request (i.e. 2022 Commencement)
   - Equipment replacement for end of service/life hardware
   - As campus grows/standards change

2. Considerations
   - Risk of delay
   - Security issues
   - Refresh cycles
Audio/Visual (AV) Infrastructure

*OIT invests in classroom and conference room equipment to serve instruction and campus business.*

Examples:

- Audio (mics, speakers, amplifiers)
- Visual (projectors, screens)
- Conference (Zoom rooms, cameras)
- Instructional (visual presenters, supplemental recording)
Audio/Visual (AV) Infrastructure

Our Process:

1. A/V need identified
   • End-of life equipment replacement
   • Duct tape & bailing wire failure
   • Request from member of campus community

2. Considerations
   • Risk of not replacing
   • Cost/Budget
   • Strategic forecasting (standards change frequently)
Enterprise (Campus) Solutions
Tech Procurement: User Requests

Jose Hidalgo
OIT Financial Analyst
<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>FY 2019 SPEND</th>
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<tbody>
<tr>
<td>Enterprise Solutions</td>
<td>$2,392,745</td>
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<tr>
<td>Network</td>
<td>$ 802,031</td>
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<td>Cyber Security</td>
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<td>AV Infrastructure</td>
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Technology Purchases by UC Campus (2019)

$618.5M

FY 2019
Take A Guess
OIT Technology Procurement Overview

• Top categories of user-requested technology purchases

  - Enterprise Applications
  - Software
  - Telecommunications
  - Cyber Infrastructure & Research Technology

• General process to follow by category
• Considerations
Enterprise (Campus) Solutions

OIT assists in the purchase, integration, launch, and maintenance of campus-wide solutions that are used by all or most users at UC Merced.

Examples:

• Office 365 (Microsoft)
• Box
• CatCourses (Canvas)
• Banner Student Information System (Elucian)
• Oracle Financials
Enterprise (Campus) Solutions

General Process:

1. Need surfaced by stakeholder
   • PMO Consultation or OIT General Request ticket
2. Agreement on need, vendor, approach, funding
3. Institutional reviews
   • Procurement, security, contract agreements, etc
4. Purchase
5. Integration
6. Implementation
7. Launch
Enterprise (Campus) Solutions

Considerations:

1. Time
   - Could take months or years depending on complexity
   - Generally requires early agreement
2. Competing campus priorities, mandates
3. Cost & budget
4. Integration
   - Is this compatible with existing systems?
5. Potential security risks
6. Implementation & project management
7. User experience
When to Engage OIT: Enterprise Solutions

Typical Timeline

1. Idea
2. Investigation
3. Identify Product/Vendor
4. Request Integration

HELP
Software

*The Center for Business Services & Solutions (CBS2)* assists users requesting licenses for most software titles.

**OIT** maintains a list of common titles for campus users (some free/immediate access) and facilitates user requests for specific software types/titles.

Examples:

- Adobe CC
- SPSS
- Microsoft Office Suite
- Matlab
Software

**General Process:**

1. Need identified by end user
   - Review OIT list of common titles
   - Submit request via CBS2 form

2. Type of software dictates process
   - Software Review Process
   - Computer lab or academic software review by Academic Technology
   - Security/data review as necessary
Software Procurement Process

- User: Submits request (ServiceNow)
  - Academic Technology: Is software for instructional use? Evaluation
    - Procurement: Privacy or Security review needed? Terms & Conditions, Insurance Review
      - Privacy Officer: Appendix GDPR required?
        - Appendix DS required? IS-3 exception required?
          - CISO: Order software
            - CBS-2: Receive software
Software

Considerations:

• Different process for:
  • OIT-managed computer lab software
  • Research computing software for MERCED & Pinnacles cluster

• Timing: depending on complexity, the process can take hours, days, weeks, or months
Telecommunications

OIT facilitates the purchase of phones and phone services for campus faculty and staff on demand.

Examples:

- VOIP (Voice Over Internet Protocol) lines & devices
- Mobile lines & devices
- Land lines
- Blue lights & emergency phone services
- Vendor porting (AT&T > Verizon, etc)
Telecommunications

**General Process:**
1. Need identified by end user/department
   - Equipment or line replacement
   - New staff & faculty needs
2. User submits ticket via ServiceNow

**Considerations:**
- Common Services Assessment (CSA) cost model
- Equipment cost
  - Non-standard devices can be significantly delayed
- Accessibility
- Campus transition to VoIP
Cyberinfrastructure & Research Technology

OIT’s Cyberinfrastructure & Research Technology (CIRT) group can assist researchers with the purchase of research computing hardware, software, and on-demand compute & storage solutions.

Examples:

- Colocation
- On-premises storage
- Cluster core-hour cycles (MERCED)
- Condo-model compute node purchases (Pinnacles)
Cyberinfrastructure & Research Technology

General Process:
1. Need identified by researcher/group
2. User submits consultation ticket via ServiceNow

Considerations:
• Cost:
  • Periodic charges for some services
  • Recharge model for some services (currently on hold)
Current State: Pains & Gains

Sean Pamer
Procurement Category Manager – I.T. & Auxiliaries
Take A Guess
Current State of Technology Procurement

**Pains**
- Supply Chain
- Approvers in Oracle
- Integration problems
- Potential Audit Failure

**Gains**
- Discounts & Contracts
- Policy Compliance
- Security & Risk Review
- Connect with Experts
Pains: Supply Chain

Delivery times are unique for tech, lead time can be very long, and supply scarcity is increasing costs.

- Examples: Laptops, servers & other equipment
- Differences between suppliers
- Dell Monitor Example: 437 day lead time!
The new Oracle approval process can take extra time.

- Delayed approvals = longer wait times BEFORE lead times
- Suppliers not responding
Pains: Integration Problems

Leaving out experts in the beginning can cause big delays later on.

• Integration or installation plans require agreement between teams
• Parallel processes can speed things up
• Your purchase could become a paperweight!
No one wants to be on the news.

- Make sure appropriate processes are followed
- Experts are a significant barrier to audit failure
Harness University of California purchasing power.

- Leverage campus & system-wide agreements
- Preferred vendors can save time & money
  - Preferential Shipping
Gains:
Policy Compliance

This isn’t your main job, it’s ours. Let us help!

• Campus and system-wide policies & procedures can be difficult to manage when you don’t do it all the time.
• New development – Small Business First Program
Let someone else read the fine print.

• Don’t agree to terms you haven’t vetted!
• Terms & conditions often place liability on the end user (you!)
Get expert advice to make the most of your purchasing dollars.

- Leverage OIT and Procurement experience
- Get tailored recommendations based on your specific needs
We understand that technology purchasing processes can sometimes be frustrating for end users.

- Get the best price/best stewardship of UC Merced funds
- Stay compliant with policy
- Protect UC Merced users & campus data
- Purchase smarter – leave the complicated things to us and leverage our expertise!
Q&A

Rachel Bellofatto
Director of Learning Technologies
Get Help

• Search the OIT Service Hub to get started

• Reach out via the methods provided in Chat or in the Webinar Resource List

https://servicehub.ucmerced.edu
We Want Your Feedback!

Feedback Survey for today’s webinar:

https://ucm.edu/TechProcurementFeedback

Thanks in advance for helping us improve our future offerings to campus!
COMING SOON: MORE BEHIND THE SCENES!

April 21: IS-3 “Ask Me Anything”

Summer: Microsoft365 Tools
OIT Behind the Scenes: Cloudy with a Chance of Infrastructure was created on location at the University of California, Merced in Merced, California!

Thanks to all the OIT folks who put hard work into this webinar!

Marisela Angel, Subject Matter Expert

Katie Adams Arca, Webinar Coordinator
tries to rein in the madness

Edson Gonzales, Webinar Support

Jose Hidalgo, Subject Matter Expert

Preethi Merugumala, Student Technology Consultant
is graduating!!!

Christian Ortiz, Student Technology Consultant
is also graduating!!!

Sean Pamer, Subject Matter Expert
That's all, folks!