



Information Management Services Division

Department of Administrative Services

Title: IMSD Administrative Process for
Procurement of Technology

Issue Date: June 1, 2015

Supersedes: Not Applicable at
this time

Definitions:

- **Approving Authority:** The individual that has the written authority to approve purchases for the given Department, Division or Agency.
- **Information Technology:** Hardware, Software, Data, Networks, Portable Devices and any other County data processing infrastructure, equipment, technology, services, components, information or material of any sort.
 - **Hardware:** Physical data processing components, goods or equipment of any sort owned or controlled by the County. Hardware includes Portable Devices.
 - **Software:** Data processing programs on or associated with Hardware, irrespective of where software resides or executes.
 - **Data:** Information, communication, material or graphics of any sort stored or transmitted electronically via the Information System or transferred to digital storage media.
 - **Networks:** Connecting systems that allow the Information System to communicate. This includes wireless networks.
 - **Mobile Device:** Any small, handheld computing device, typically having a display screen with touch input and/or a miniature keyboard and weighing less than 2 pounds. Includes smart phones, tablets and other similar devices.
 - **Portable Devices:** County portable hardware, including mobile phones, tablets and laptops.
 - **Services:** Professional Services to implement hardware, software, networks or similar.
- **Process:** A series of steps conducted to fulfill a request for a technology purchase
- **Architectural Review Committee (ARC):** Committee that reviews small, large and continuous improvement technology project requests to partner with clients to align business process with existing IMSD strategy and technology.
- **Information Technology Steering Committee (ITSC):** - Approving Authority Committee that reviews technology spend requests over \$50,000.



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	<ul style="list-style-type: none"> • Technology Investment Intake Process (TIIP): form to be completed when small, large or continuous improvement projects are requested. • IMSD Project Management Office (PMO): IMSD group that resources and runs approved technology projects. • User: Any person, including an employee, consultant, contractor or agent using County Information System. • Business Analyst (BA): IMSD Business Analyst
<p>Purpose:</p>	<p>This process sets out the steps taken by County Departments and Divisions to interact with IMSD for the procurement of technology goods and services. IMSD will review each request to understand the business need, ensure standardization and optimization and to maximize industry best practices with IT Spend. This process does not replace the role and responsibility of the County Procurement Division but to define the steps prior to making a request of the Procurement office.</p>
<p>Out of Scope</p>	<ol style="list-style-type: none"> 1) General Mitchel International Airport 2) Milwaukee County Transit Divisions 3) County Wide Non-Departmental Spend Accounts
<p>Process:</p>	<ol style="list-style-type: none"> 1) User submits request by completing the <u>IMSD Purchase Request Form</u>. 2) Requestor's Manager receives email alert with link that enables him/her to approve the request. 3) Following Manager's approval of request, IMSD BA and Service Desk Manager receive email alert with link that enables him/her to approve the request. <ol style="list-style-type: none"> a. BA reviews request to ensure that request meets business need, that request includes quote or invoice, that that request is for standardized software or hardware. <ol style="list-style-type: none"> i. If request meets business need and standardization criteria, BA approves request. (Move to step 4) ii. If request is for new software or is deemed to be a small large or continuous improvement technology project, BA works with client to complete Technology Investment Intake Process (TIIP) form. (Move to step A) b. Service Desk Manager reviews request to ensure that software, licensing is in place for software requests or if



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	<p>hardware request, inventory is available. If not, Service Desk Manager will prepare quote and add quote to request form.</p> <ol style="list-style-type: none">4) When BA approves request, Business Office Fiscal Team receives email alert with link that enables him/her to approve the request.<ol style="list-style-type: none">a. Fiscal Team reviews request to ensure completeness and accuracy.<ol style="list-style-type: none">i. If request is complete, Fiscal Team approves request (Move to Step 5).ii. If request requires additional information, e.g. quote, Fiscal Team will communicate with BA to obtain additional information.5) Following the Fiscal Team's approval of request, fiscal team processes order.<ol style="list-style-type: none">a. Fiscal team executes order and enters and approves PG or PO.b. PG or PO is processed in Advantage overnight batch.c. Fiscal Team sends PO to vendor for fulfillment.6) IMDS notifies Requestor of receipt of PO or receipt of goods.7) For requests that are not related to payment for existing services, e.g. maintenance agreements, IMSD fulfills request. <p>From Step 3.a.ii</p> <ol style="list-style-type: none">A. TIIP form is completed by BA and Requestor or appropriate client subject matter expert.B. TIIP form is submitted to Architectural Review Committee (ARC) to align business need with existing technology strategy, systems, applications and infrastructure and partner with client in identifying the best possible solution.<ol style="list-style-type: none">1. If cost of proposed project is less than \$50,000, project is submitted to IMSD Project Management Office (PMO) for review and approval.2. If cost of proposed project is more than \$50,000, project is submitted to IT Steering Committee for approval.
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Contact:	IT Procurement requests should be directed to the IMSD Business Analysis team at: IMSDBAs@milwaukeecountywi.gov
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