

Timeline: Annual Equipment Requests FY 2019-2020

11/19/2019

Goal: Allocate FY 2019-2020 Centralized Library Funds for Technology and Non-Technology Equipment. This includes, but is not limited to, computers, software, scanners, peripherals, and IT-related furniture.

Completion Dates and Objectives

11/14/2019: AUL DL consults with AULs, Cyberinfrastructure Team, and Director P&B on timeline.

11/22/2019: The AUL DL initiates the Call which includes the statement of library priorities for the current equipment cycle. The Call will be communicated via email.

Cyberinfrastructure Team opens the "[Annual Equipment Requests](#)" (AER) application on the LibApps portal. The AUL DL will notify the staff who are authorized to input requests, typically Department Heads and Designees.

The Cyberinfrastructure team will pre-populate the Annual Equipment Request application with a list of technology purchases already submitted by each division during the current fiscal year.

Department Heads and Designees from each division consult with their AUL and enter their technology requests into the AER application. Requestors should:

- Begin assembling requests now, so that if there are complications or vendor delays, there is plenty of time to process their orders.
- Consult with Cyberinfrastructure and Facilities about their requests as needed.
- Include costs for any furniture or facilities requests (e.g., new furniture needed to implement a technology purchase) in each request/item.
- Include the cost of maintenance agreements associated with each request, if applicable.

Justifications must be included the following for each request/item:

- How the item/request supports UCR and Library Strategic Plans.
- How the item/request supports Division/Department Goals.
- The risks or impact of not approving the item/request.

1/17/2020: 5:00PM deadline on this date for submitting requests to the Annual Technology Request application.

Cyberinfrastructure Team reviews and updates each request, if needed:

- Ensure costs estimates are accurate, and all requirements are included (e.g., hardware/software components, peripherals, service agreements, and network infrastructure support).
- Consult and review facility infrastructure requirements with Library Facilities.
- Add or update cost estimates where needed, to include estimated tax and shipping.
- Inform the requesting AUL of recommended modifications to the original request.

1/31/2020: AULs review updated requests and re-prioritize if needed.

Initial prioritized lists are provided to the AULs, based on their areas of responsibility:

- UL for Development, UL's special initiatives, and Library Administration – including Accounting, Facilities, Planning/Budget.
- DUL for Communications, Access Services, Research Services, Teaching/Learning, and Human Resources.

- AUL C&D for Collection Strategies, Acquisitions, MTS, Medical Library Programs, SCUA, and Special Research Projects.
- AUL DL for Library-wide technology, Cyberinfrastructure, Digitization Services, and Digital Initiatives.

2/7/2020: Cyberinfrastructure begins the following:

- Consolidate all divisional and Library-wide requests into a Final Prioritized List.
- Maintain the order of rankings within each division whenever possible.
- Consult Library Facilities for all facility infrastructure requests.
- Coordinate purchasing information with Planning & Budget.

2/14/2020: The Final Prioritized List is submitted to the AULs and Planning/Budget for review.

- AULs and Planning/Budget revise the Final Prioritized List as necessary.
- When AULs and Planning/Budget agree on the list, Final Prioritized List is provided to the UL.

2/24/2020: UL approves the final list of requests.

3/2/2020: The final approved list is posted to the staff wiki; Library staff are notified by Library News email. Cyberinfrastructure Team works with Planning and Budget to Initiate Purchase Requests

Cyberinfrastructure begins the following:

- Finalize order details and initiate purchase requests with Planning/Budget.
- Escalate questions about a purchase request to the AUL DL, who will consult with the requesting AUL and the UL (as needed).
- Use the AER application to document the status of each order request.

Orders for Placeholder items may not exceed the total amount of funds approved for the item. If funds are left over after the approved items have been purchased, the AUL DL will review with the AULs and consider recommending additional items to the UL for purchase.

4/1/2020: Financial Services Supervisor ensures purchasing has been initiated for all approved equipment requests.

As equipment and any furniture is received, Cyberinfrastructure performs the following:

- Retrieve and annotate the packing slip.
- Deliver the packing slip to P&B.
- Initiate equipment delivery
- Document delivery, packing slips, and delivery in the AER application.