

## Timeline: Annual Equipment Requests FY 2018-2019

1/25/2019

**Goal:** Allocate FY 2018-2019 Centralized Library Funds for Technology and Non-Technology Equipment. This includes, but is not limited to, computers, software, scanners, peripherals, and furniture.

### Completion Dates and Objectives

**1/28/2018:** AUL DL consults with AULs, Cyberinfrastructure staff, and Director P&B on timeline.

**1/29/2019:** AUL DL solicits 2019 technology and non-technology equipment priorities from UL.

**1/30/2019:** 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 opens the "Annual Equipment Requests" (AER) application in the LibApps portal.

The AUL DL will notify the staff who are authorized to input requests, typically Department Heads and Designees.

Divisions begin to determine, justify, and request their annual equipment requests within the AER application. Department Heads and Designees take action on the following:

- Input their prioritized list of requests/items into the AER application.
- Solicit additional information from their areas as needed, and consult with Cyberinfrastructure and Facilities as necessary.
- Ensure facilities costs generated by computing requests (e.g. furniture needed for new hardware) are addressed in each request/item.
- If maintenance agreements for items are needed, include them with each request/item.
- The Digital Library divisional requests include division-specific items as well as library-wide items that support Cyberinfrastructure and Digital Initiatives.
- Department Heads and Designees are encouraged to begin now, so that if there are complications or other delays, there is plenty of time to meet the upcoming deadline and avoid delays to the critical path.

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

- How the item/request ties into the Library's Strategic Plan.
- How the item/request ties into the UCR Strategic Plan.
- How the item/request ties into the Division/Department Goals.
- The organizational/institutional risks of not approving the item/request.

**3/8/2019:** Divisions, Department Heads, and Designees complete their equipment requests.

Cyberinfrastructure begins the technical review of each request:

- Review associated information technology costs, including related hardware/software components, peripherals, service agreements, and network infrastructure.
- Consult and review facility infrastructure requirements with Library Facilities.
- Provide cost estimates, including estimated tax and shipping costs.
- Inform the requesting AUL of items that may have been overlooked by the requestor.
- Inform the requesting AUL of recommended modifications to the original request.
- Include “Placeholder” requests when it is not possible to detail specifics of the request. Placeholder requests include estimated cost and a general description of a group of items or a goal.

Library Facilities will review and address all furniture items.

**3/29/2019:** AULs prioritize requests for their division.

All submitted requests are to be prioritized, including those not being acquired.

Combined prioritized lists should be submitted to the AUL DL from the following Cabinet members:

- DUL for Communications, the Music Library, Research Services, and Teaching/Learning.
- AUL DL for Library-wide technology, Cyberinfrastructure, and Digitization Services.
- AUL C&D for Collection Strategies, Medical Library Programs, SCUA, and Special Research Projects.
- UL for Development, Library Administration, and UL’s special initiatives.
- Director P&B for Acquisitions Accounting, Facilities, Planning/Budget.
- Director ODHR for Library HR.

**4/5/2019:** Cyberinfrastructure begins the following:

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

**4/12/2019:** The **draft** Final Prioritized List is submitted to the AULs and Planning/Budget for review.

**4/19/2019:** AULs and Planning/Budget revise the **draft** Final Prioritized List as necessary.

Changes are communicated to the Requestor, Cyberinfrastructure, and Library Facilities.

AULs and Planning/Budget agree on the list.

The **draft** Final Prioritized List is provided to the UL.

**4/25/2019:** UL approves the final list of requests.

**5/1/2019:** The final approved list is posted to the staff wiki; Library staff are notified by Library News email.

Cyberinfrastructure begins the following:

- Finalize ordering details, consulting with Library Facilities where necessary.
- Initiate purchase requests with Planning/Budget.
- Escalate atypical 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.

Library Facilities will address all furniture items in like fashion.

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.

**6/28/2019:** Director P&B ensures purchasing has been initiated for all approved equipment requests.

As equipment 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.

Library Facilities will perform the same for all furniture items.