Submitting Technology Project Requests and Pre-Procurement IT Review Requests

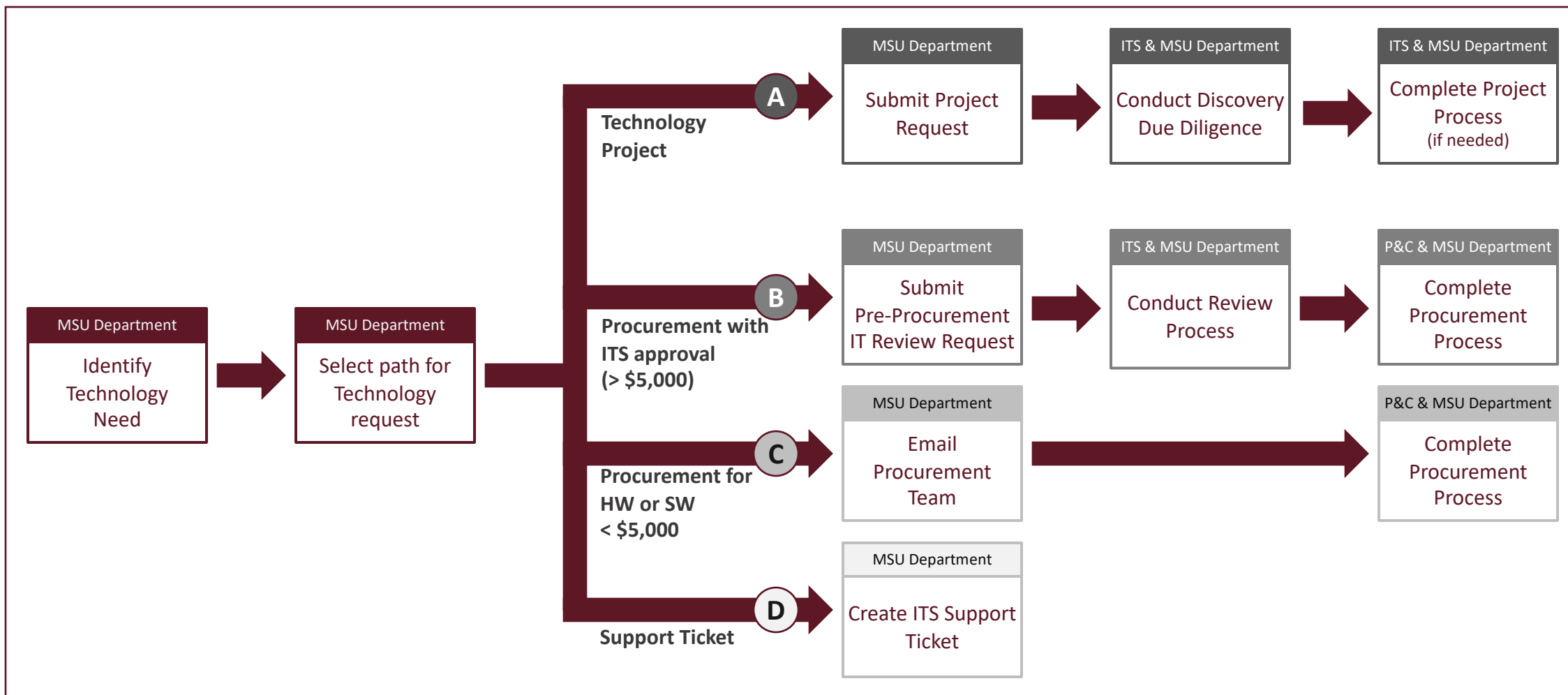*(KB Article ID 1852)*

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❖ **Technology Requests: Which do you need?**

  o **Technology Project Request?**
  o **Pre-Procurement IT Review Request?**
  o **Service Ticket?**

❖ **Technology Project or Pre-Procurement IT Review Request Workflow Overview**

❖ **Technology Project and Pre-Procurement IT Review Work Intake: Step-by-step Guide**

Depending on your technology need, the entry point and path may vary. The diagram below summarizes the action you need to take to get started.
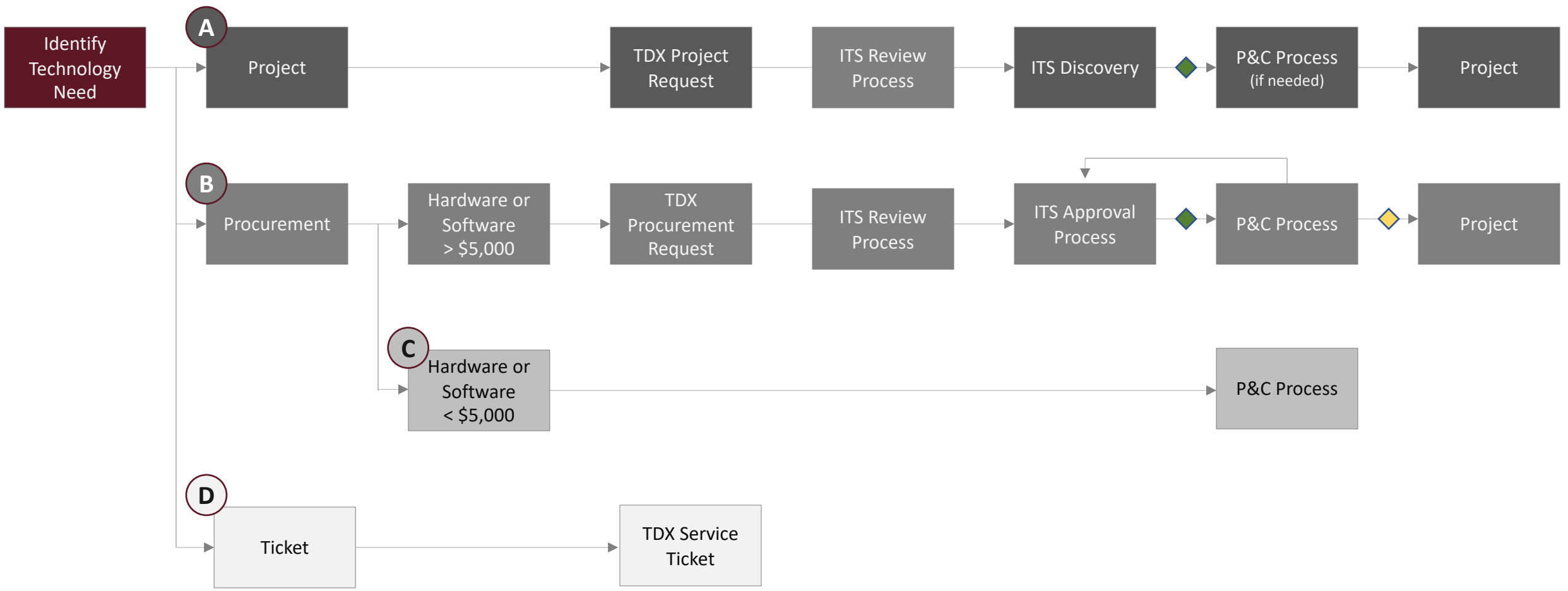

MSU Department	MSU Department				
Identify Technology Need	Select path for Technology request				

A — Technology Project

MSU Department	ITS & MSU Department	ITS & MSU Department
Submit Project Request	Conduct Discovery Due Diligence	Complete Project Process (if needed)

B — Procurement with ITS approval (> $5,000)

MSU Department	ITS & MSU Department	P&C & MSU Department
Submit Pre-Procurement IT Review Request	Conduct Review Process	Complete Procurement Process

C — Procurement for HW or SW < $5,000

MSU Department	P&C & MSU Department
Email Procurement Team	Complete Procurement Process

D — Support Ticket

MSU Department
Create ITS Support Ticket

The path for getting support for your technology needs depends on the scope, size and risk of work that needs to be performed. Please use the following table to determine the best path for you to follow:

	A Project	**B** Procurement w/ITS approval	**C** Procurement Only	**D** Ticket
Software Scope	New software or major enhancements to existing software	Software > $5,000	N/A	Fixes, minor enhancements or operational maintenance for existing software.
Infrastructure Scope	Examples: Construction. Renovations. Classrooms. Server refresh. Network refreshes.	HW > $5,000	HW or SW < $5,000	Examples: Network drops. DSN changes. Telecom Adds/move/changes.
MSU Stakeholders	1+ MSU Departments	1 MSU Department	1 MSU Department	1 MSU Department
Risk	Low to Very High	Low	Low	Low
VP Governance	Needed	Not needed	Not Needed	Not Needed
Links:	Create Technology Project Request	Create Pre-Procurement Review Request	Send Email to Procurement	Create ITS Ticket
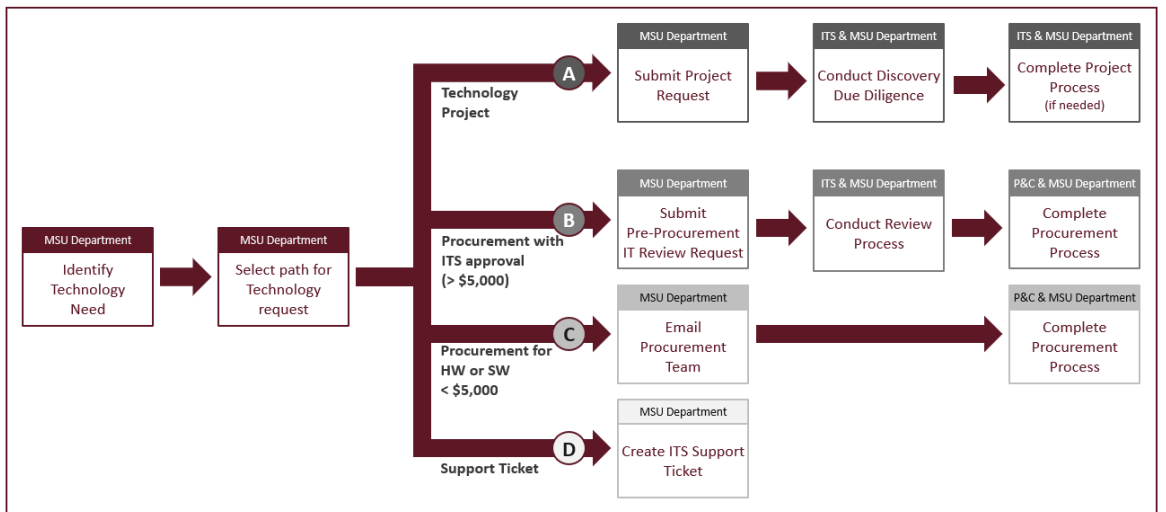
Not all technology needs will fit neatly into a specific category.
If you are in doubt, pick the path that seems best based on your understanding of the scope.

* Cellular devices are a special case and require ITS review regardless of cost

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Identify Technology Need

A

Project → TDX Project Request → ITS Review Process → ITS Discovery → ◆ → P&C Process (if needed) → Project

B

Procurement → Hardware or Software > $5,000 → TDX Procurement Request → ITS Review Process → ITS Approval Process → ◆ → P&C Process → ◆ → Project

C

Hardware or Software < $5,000 → P&C Process

D

Ticket → TDX Service Ticket

◆ IT Project Request Needed

◆ IT Approval for Procurement

A

Sponsor/Champion	ITS Director (CIO/EIS/ITI)	ITS Project Manager

Sponsor/Champion
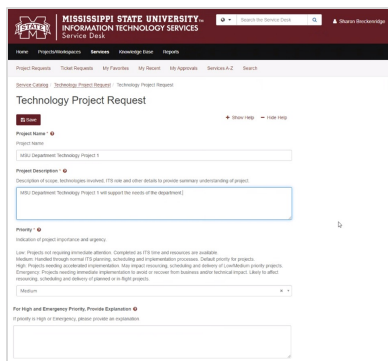
- Enter Project Request
- Submit Request to ITS
- View Requests

ITS Director (CIO/EIS/ITI)
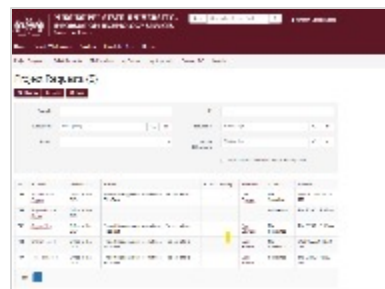
- View Project Request Queue
- Review and Act on Request
- Assign ITS PM

ITS Project Manager
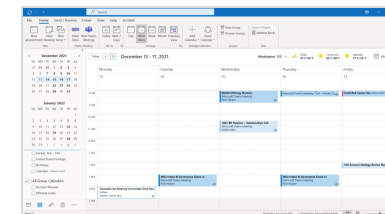
- Notify Sponsor and Stakeholders
- Schedule Discovery session with Sponsor
- Complete Discovery Due Diligence Form
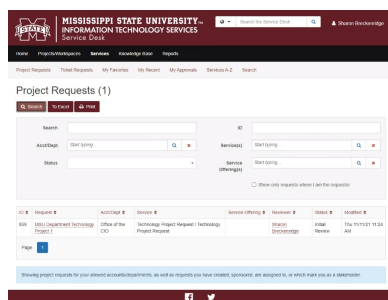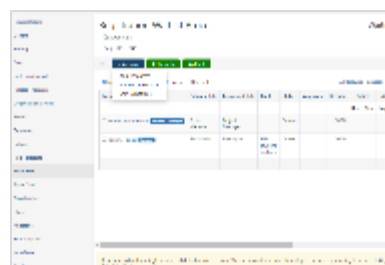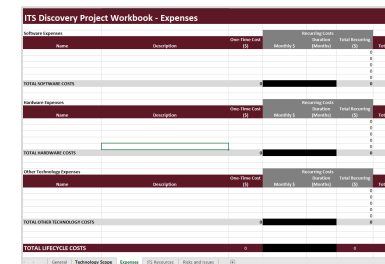
> Expected notification to Sponsor is within 2-3 business days from Project Request submission.

B

Sponsor/Champion	Office of the CIO	Sponsor/Champion
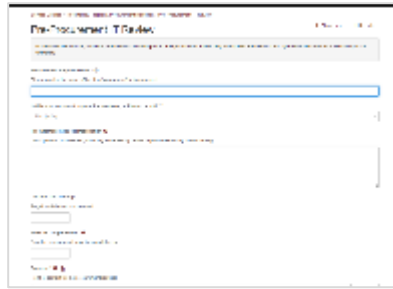
Enter Pre-Procurement IT Review Request

Send Approval email and attachments to Sponsor and P&C

Work with P&C and follow procurement process

Approve

Submit Request to ITS

Review Pre-Procurement IT Review Request Details and Act
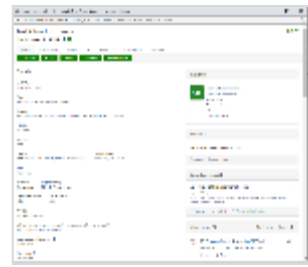
Return/ Reject

Return/Reject request with explanation of additional detail needed

Collect and provide additional information/files and resubmit request to ITS

View Requests for Status
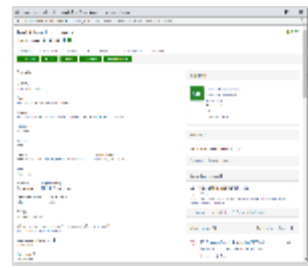
Decline

Decline request with explanation

Expected notification to Sponsor is within 2-3 business days from Procurement Request submission.

Key Highlights and Takeaways

- Navigate to the MSU ITS Service Desk for creating tickets or submitting project and procurement requests for your technology needs

- https://servicedesk.msstate.edu/TDClient/45/Portal/Home

Next Step

- Click "Request a Service"

Key Highlights

- "Technology Project & Procurement Request" is accessible to MSU Faculty & Staff through TDX Service Catalog

- Users request projects similarly to other service requests

- https://servicedesk.msstate.edu/TDClient/45/Portal/Requests/ServiceCatalog

Next Step

- Click on "Technology Project & Procurement Request" to start the submission process

Key Highlights

- Accessible to MSU Faculty & Staff through TDX Service Catalog

- https://servicedesk.msstate.edu/TDClient/45/Portal/Requests/ServiceDet?ID=1167

Next Step

- Click "IT Project Request"

Key Highlights

- Accessible to MSU Faculty & Staff through TDX Service Catalog

- https://servicedesk.msstate.edu/TDClient/45/Portal/Requests/ServiceDet?ID=1612

Next Step

- Click "Request Project"

Key Highlights

- The Technology Project Request form captures "just the facts" basics to summarize the project need for an ITS Director to qualify the request for Discovery and determine the next steps

- Additional project details will be captured collaboratively – Project Requestor/Sponsor, IT PM and other IT resources or expenses – during Discovery due diligence.

- Accurate dates assist ITS in planning the technology resources for your projects. Based on your current understanding, please enter your expectations for project start date, end date, and the date by which the project must be finished.

- All dates will be refined during the Discovery phase.

Key Highlights

- A successful project requires the support and involvement of many resources across MSU.

- Two of the non-ITS roles critical to the project success:
  - The Sponsor serves as the primary department point of contact through the project lifecycle
  - The Champion is the MSU Division vice-president who owns the budget and sets the overall priority of the project

Key Highlights

- This set of attributes provides a quick snapshot of the project needs. They will give ITS an initial idea of scope to determine if Discovery is needed for due diligence.

- The Discovery phase is a new step in the technology work intake process for the requesting Department and ITS to collaborate earlier on details needed for the MSU procurement process and ITS planning and delivery.

- Example Guidelines for Discovery:
  - Requires ITS resources – project & support
  - Combines HW/SW

- Details will be refined by the Sponsor and the ITS project manager during the Discovery due diligence phase.

Key Highlights

- The Priority field defaults Medium. An additional assessment or priority will be completed during Discovery.

- The Request submission process takes multiple steps. If you don't complete those steps, your request will not be available to ITS for review and your request will be delayed.

Next Step

- Scroll to the top of the form and Click on "Save" to save your entries.

Key Highlights

- After entering and reviewing your project details you will save your project request.

- At this point the request is only saved and not submitted. You will be able to adjust your entries as needed prior to submission.

Next Step

- Click on "Save" to save your entries.

Key Highlights

- Your project or procurement request is now created and saved.

- Remember, your request had not been submitted yet.

Next Step

- Click "Review and submit this request"

Key Highlights

- Your request now has a status of "Not Submitted"

- At this point you can provide

  o Files. If you have documents to provide ITS additional details, attach them now.
  o Stakeholders. List individuals at MSU you want to keep informed about the request.

Next Step

1. Click "Files" to attach documents. (Optional)

2. Click "Stakeholders" to add stakeholders. (Optional)

3. Click "Mark Complete and Submit" to submit your project or procurement request to ITS
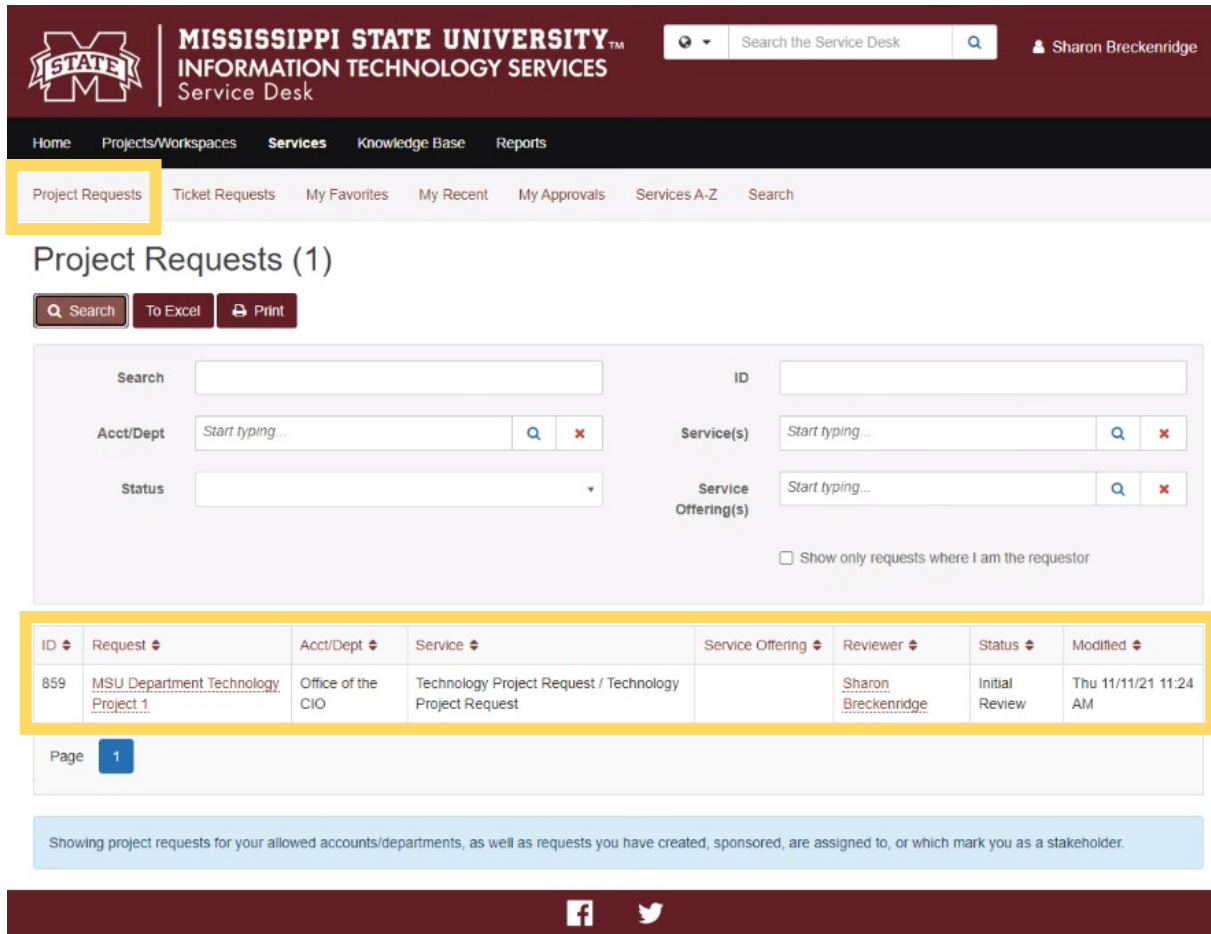
Key Highlights

- Congratulations! Your IT project request was successfully submitted.

- The ITS team will now review your request. You should expect to hear back in 2-3 business days.

- From here you can choose to review this and your other requests.

Next Step

- Click "View other Requests" to review your project and procurement requests

Key Highlights

- Lists all the project requests you have created and their current status

Key Highlights

- Accessible to MSU Faculty & Staff through TDX Service Catalog

- https://servicedesk.msstate.edu/TDClient/45/Portal/Requests/ServiceDet?ID=1609

Next Step

- Click "Request Service"

Key Highlights

- The Pre-Procurement IT Review Request form captures the procurement needs for an ITS Director to qualify the request and determine the next steps.

- If your request is less than $5,000 you do not need to complete the Pre-Procurement request form.

- Cellular devices are a special case and require ITS review regardless of cost.

- Additional information such as potential vendors, LLC, VPAT and HECVAT documents may be needed to complete the approval process.

Key Highlights

- This set of attributes provides a quick snapshot of the procurement needs.

- Attach any required files. Procurement requests without complete documentation will be Rejected/Returned to be completed.

- Only need to hit Request button to submit (no longer need to mark complete and save)

- Guidelines for evaluation:
  - Required files (ex. LLC, HECVAT, VPAT)
  - Procurement mode (ProCard, requisition, wire transfer)
  - Vendors considered
  - Connects to MSU network
  - Uses/transmits/ stores sensitive data

Key Highlights

- Your pre-procurement IT review request is now created and saved.

- You should receive an email that the request has been created.

Next Step

- Click "View your ticket requests"

Key Highlights

- If you forgot to add files, you do not need to contact ITS – option is available as long as request has not been approved/rejected.

- You can add comments and notify ITS if additional assistance is needed.

Key Highlights

- Lists all the ticket and pre-procurement IT review requests you have created and their current status