This session...

- Committee members
- Last years results
- Reminders from FY16
- Overview of the process
- Timeline (new)
- Q&A on the process
- Demonstration of online request form.
- Q&A on the form.

Colorado College
Committee Members

• Chris Coulter, Director of Facilities Services
• Don Davidson, Director Administrative Services
• Mike Siddoway, Associate Dean of The Faculty
• Enid Ruiz-Mattei, Senior Budget Analyst.
Last year Results

- FY16 Base Funding: $362,800
- FY16 Total Number of Req. #115
- FY16 Fund$ Requested: $678,423
- Total Awarded $362,518
- No additional funds awarded in FY16
- FY17 Base Funding $362,800
- Small contingency.
Recaps FY16

• Fy16 Base funding $362,000

• This process is only:
  – Instructional Item
  – Furniture
  – Other equipment

• Technology purchases are handled thru ITS:
  (computers, AV equipment, etc)
Definitions

- Items that cost more than $500
- This is a per item guideline.
  - Instructional items: Lab equipment, field instruments, white boards.
  - Furniture: classroom, common areas, office.
  - Other items: facilities equipment, athletics equipment.
- Remember R & R Projects – whiteboards, furniture?
Process Overview

• Departments:
  – Consult with Committee members if needed
  – Prioritize your items (#1 been the most important)
  – Submit request in timely manner (add date)

• Committee:
  – Evaluate each request
  – Make recommendations: President & Cabinet
  – Communicate approvals.

Colorado College
Timeline for FY 2016-17

- Nov 13th 2015 – Information Session
- Nov 13th – Self Service Banner Opens up.

- Consultation with Committee Members
- Request Process in Self Service Banner (SSB)

- February 12th 2016 Capital Equipment Request process closes out.

- Board of Trustees approves overall Budget FY2016-17.

- Committee Members reviews all requests and forward final recommendations to President & Cabinet.

- Budget Office on behalf of the Committee, notifies approvals.

- Funds available after that time for purchase.
Don’t’ Forget!

- Instructional Items, Furniture, Other (e.g. facilities or athletic equipment.)
- Computers, Smart Classroom, AV type equipment no longer part of this process.
- R & R Projects
- Small Contingency funds
- Questions: contact committee members.
- Key date: **February 12, 2016**
- All this information in the Finance website
Capital Equipment Request
Entering New Request SSB
To create an equipment request, select ‘Finance.’
Select ‘Capital Equipment Request Menu’ to create, edit or review your requests.
Select the ‘Capital Equipment Request Form.’
Choose the organization code making the request. Only those codes you have access to will be available here.

Choose the Account code that applies to the item you are requesting.

Please note, there is no longer an account for Computer Equipment.
Identify if this request is a replacing an existing item, or a Net (new) addition to the area or department.

Choose item from drop down list. If not listed, select “Other” and add a short description in the box. (100 Characters)

Key the price listed if it is a standard item, office furniture for example, or key the best estimate you have.

Choose a Priority. Make sure each request has a unique priority number. If not, the system will renumber lower prioritized items.
About Priorities...

• Items most important to the department should be at the top of the list.
• If you finish the list and need to change priority of an item, make the change and all subsequent priorities will be renumbered accordingly.
  – Example: if you change item with priority #3 to a #1, then the original item with priority #1 becomes 2, #2 becomes 3, and so on.
Choose a Priority. Make sure each request has a unique priority number. If not, the system will renumber lower prioritized items.

Note that the priority has been set to 2 and all subsequent priorities have been renumbered.

Thank You Enid Ruiz-Mattei

Your request for Recommended_PC_Desktop in Budget Office has been received.
Name of the person that will own or will be directly associated with this equipment. In addition identify the Constituency (Admin Staff, Student, Faculty, etc) from the drop down box.

Write a brief explanation (250 characters or less) for this request.

Name of the Owner *
Who will "own" the item. If it is in a common area, who will be most closely associated with this item (e.g. John Smith)?

Enid Ruiz

Owner Constituency *
Please select the constituency which most closely matches the owner listed above.

Administrative Staff

Rationale *
Please provide a brief explanation for your request (250 characters or less). (e.g. "Life cycle replacement", "upgrade of obsolescent system", "safety students" or "New federal regulations")

Old 10-key calculator not giving me the numbers I want. Needs replaced.

Renewal and Replacement Request
Please select Yes or No from the menu if there is an R&R request for this equipment.

No

All Renewal and Replacement Requests need to be submitted at the Facilities website http://www.coloradocollege.edu/offices/facilities.
This system or process no longer gathers R&R Request. This menu is for the user requesting item to remember to include any Capital Equipment needs that might result from an approved R&R project.

If you are requesting an item that is a net addition to your department, enter any estimated supply costs associated with the purchase (e.g. toner for a new copier/printer).

**Name of the Owner** *
Who will "own" the item. If it is in a common area, who will be most closely associated with this item (e.g. John Smith)?

**Owner Constituency** *
Please select the constituency which most closely matches the owner listed above.

**Rationale** *
Please provide a brief explanation for your request (250 characters or less). (e.g. "Life cycle replacement." or "Life cycle replacement, and I need a better processor and more RAM in order to be able to run large datasets for my research")

**Renewal and Replacement Request**
Please select Yes or No from the menu if there is an R&R request for this equipment.

No

All Renewal and Replacement Requests need to be submitted at the Facilities website [http://www.coloradocollege.edu/offices/facilities](http://www.coloradocollege.edu/offices/facilities).
Once completed:
You will receive a confirmation email with a summary of your request.

When checking on your request, please reference the request number.
Capital Equipment Request Process

Editing Existing Requests
While the process is still open, you can edit a prior request by selecting 'List/Edit' from the Finance menu.
<table>
<thead>
<tr>
<th>Dept Priority</th>
<th>Request #</th>
<th>Price</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>4188</td>
<td>$50,001</td>
<td>Enid</td>
</tr>
</tbody>
</table>

**Rationale:**

Furniture color doesn't match my complexion.

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**Rationale:**

Life cycle replacement

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**Rationale:**

It is well documented that my work performance improve with a decent afternoon nap.
It will take you back to the Equipment Request entry form with the information of the request prepopulated. Make all the changes needed.
Additional Yearly Supply costs $
If you are requesting an item that is a net addition to your department, enter any estimated supply costs associated with the purchase (i.e. toner for a new copier/printer).

Name of the Owner *
Who will "own" the item. If it is in a common area, who will be most closely associated with this item (e.g. John Smith)?
Me Myself and I

Owner Constituency *
Please select the constituency which most closely matches the owner listed above.
Administrative Staff

Rationale *
Please provide a brief explanation for your request (250 characters or less). (e.g. "Life cycle replacement." or "Life cycle replacement, and I need a better processor and more RAM in order to be able to run large datasets for my research")

Renewal and Replacement Request
Please select Yes or No from the menu if there is an R&R request for this equipment.
No

All Renewal and Replacement Requests need to be submitted at the Facilities website http://www.coloradocollege.edu/offices/facilities.

[ List/Edit your current Capital Equipment Requests | Display Capital Expense Form ]
Need more help?

Call or Email the Budget Office

Enid Ruiz-Mattei, 389-6854 or enid.ruizmattei@coloradocollege.edu
THANK YOU!!