

# ITD Proposal Management System (ProSys)

## Overview

The ITD Proposal Management System (ProSys) is a comprehensive software solution designed to improve the way Information Technology Department creates proposals for services and equipment requested by county agencies and departments, require approvals and tracks proposals, eliminating the need for traditional paper-based documentation.

## Key Features and Benefits

### 2.1. Proposal Creation and Collaboration

ProSys is a Salesforce Platform application that offers a user-friendly interface enabling ITD proposal creators to create, edit, and collaborate on proposals in a digital environment. County departments and agencies will be able to view, approve and provide the accounting information for their proposals as well as search for proposals by specific criteria. Each department has a customized approval workflow that includes the Finance Department and streamlines the approval process.

### 2.2. Centralized Proposal Repository

ProSys serves as a centralized repository for all proposals, eliminating the risk of document loss or misplacement. Users can easily search, retrieve, and access proposals at any time, significantly improving efficiency and reducing the time spent searching for information.

### 2.3 Board Letter Generation

The system provides reports that can be used to easily generate the Board Letter text and the documents associated to a Board Letter (Financial Recommendation, Sum to Auditor).

Board Letter coordinators and ITD Finance can view/create specific reports to facilitate the processing of a Board Letter and Supporting Documents.

### 2.4 Automated Workflows and Notifications

ProSys automates the proposal approval workflows, including review and approval processes from ITD as well as Department approvers. ITD Account Managers can

define customized approval workflows for their departments, and receive automated notifications, reducing bottlenecks and ensuring timely completion of proposals. The system tracks the approval steps and allows sending reminders to pending approvers.

### 2.5 Approvers Dashboards

ITD approvers as well as Departments approvers have a dashboard that allows them to view all the proposals waiting for their approval and act on them.

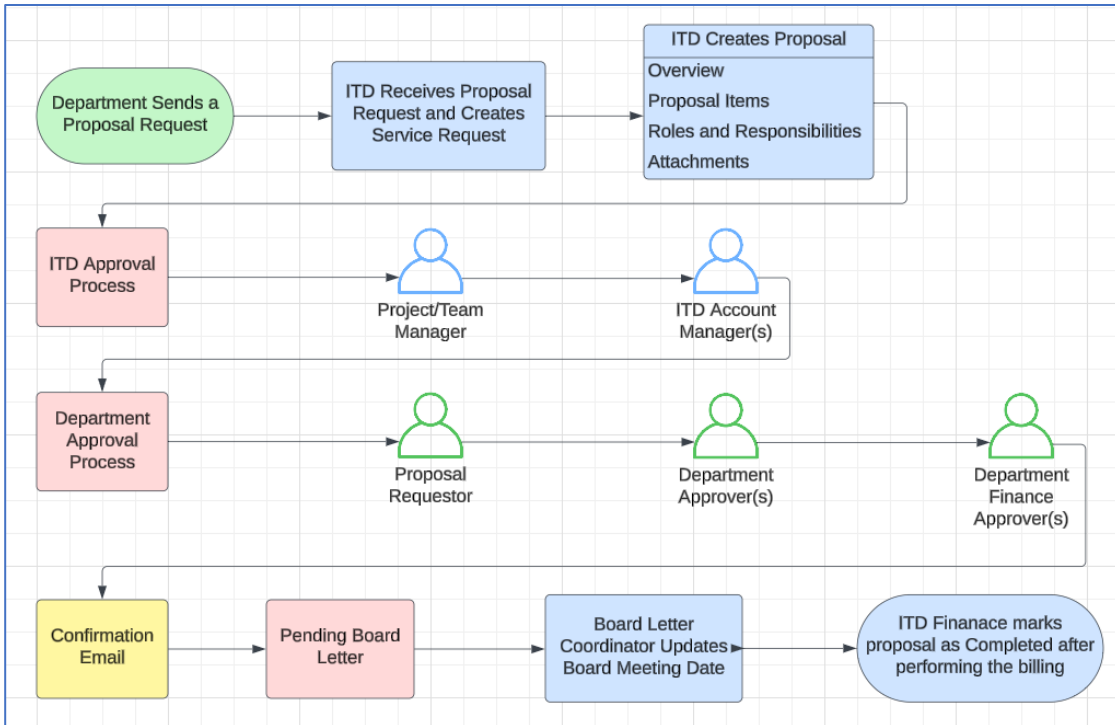
### 2.6. Analytics and Reporting

The system provides comprehensive analytics and reporting capabilities, offering insights into proposal performance and overall status of the proposals. ITD users can easily generate customized reports and share the reports with department users.

### Conclusion

The Proposal Management System (ProSys) provides a paperless solution for efficient proposal creation, collaboration, and management. By leveraging digital tools and automation, it enhances productivity, data accuracy, and proposal quality while reducing operational costs and environmental impact.

### Proposal Process High Level overview



## Screenshots

### Proposal Screen:

Draft
Pending ITD Appro...
Pending Client App...
Declined
Pending Board Letter
Cancelled
Completed

✓ Mark Status as Complete

Proposal

**PR-000328**

Edit
Delete
Start ITD Approval
Clone
▼

**Details**
Proposal Items
Notes/Attachments
Roles And Responsibilities
Approval History
Accounting Charges
Board Letter

▼ Information

Status Draft <span style="float: right;">✎</span>	Proposal No PR-000328
Current FY <span style="float: right;">❗</span> 2024 <span style="float: right;">✎</span>	Start Current FY Date 7/1/2023
Team <a href="#">Client Services</a> <span style="float: right;">✎</span>	Agency/Department <a href="#">HCSA- Office of Agency Director</a> <span style="float: right;">✎</span>
Service Request# 1097845 <span style="float: right;">✎</span>	Title SR 1097845 HCSA OAD 4-Port USB Hub and Topaz e-signature device <span style="float: right;">✎</span>
Proposal Type Purchase <span style="float: right;">✎</span>	Board Letter Required <input checked="" type="checkbox"/> <span style="float: right;">✎</span>
Requestor Name Luella Penserga <span style="float: right;">✎</span>	Requestor Email <a href="mailto:luella.penserga@acgov.org">luella.penserga@acgov.org</a> <span style="float: right;">✎</span>
Presenter Project Manager <span style="float: right;">✎</span>	Needs Client Approval <span style="float: right;">❗</span> Yes <span style="float: right;">✎</span>
Url View Proposal <span style="float: right;">❗</span> <a href="https://prosys.acgov.org/Approver/ViewProposal?id=a3L6T000004kwVqUAI">https://prosys.acgov.org/Approver/ViewProposal?id=a3L6T000004kwVqUAI</a>	Url Accounting <span style="float: right;">❗</span> <a href="https://prosys.acgov.org/Approver/ChangeAccounting?id=a3L6T000004kwVqUAI">https://prosys.acgov.org/Approver/ChangeAccounting?id=a3L6T000004kwVqUAI</a>
Executive Summary The Health Care Services Agency – (OAD) will provide funds for this request. <span style="float: right;">✎</span>	Goals and Objectives <span style="float: right;">✎</span>

★
+
?
⚙️
🔔

ProSys
ProSys Dashboard
Proposals ▼
Teams ▼
Agency/Departments ▼
Proposal Items ▼
Client Approval Templates ▼

✓
Pending ITD Appro...
Pending Client App...
Declined
Pending Board Letter
Cancelled
Completed

✓ Mark Status as Complete

Proposal

**PR-000316**

Edit
Delete
Clone
Clone Proposal & Items
▼

Details
**Proposal Items**
Notes/Attachments
Roles And Responsibilities
Approval History
Accounting Charges
Board Letter

**Proposal Items (2)** ⚙️ 🔄 New



2 items • Sorted by Item No • Updated a few seconds ago




	<input type="checkbox"/> Item No ↑	<input type="checkbox"/> Needs Budget Adjust...	<input type="checkbox"/> Agency/Department	<input type="checkbox"/> Item Name	<input type="checkbox"/> Quantity/N...	<input type="checkbox"/> Unit Cost	<input type="checkbox"/> Charge
1	<input type="checkbox"/> <a href="#">PI-000896</a>	<input checked="" type="checkbox"/>	Treasurer-Tax Collector	Plantronics - Blackwire 3220 Headset	1	\$40.00	40.00
2	<input type="checkbox"/> <a href="#">PI-000897</a>	<input checked="" type="checkbox"/>	Treasurer-Tax Collector	Tax-Fee	1	\$4.10	4.10

View All


**Notification email for Department Approvers**

Please approve ITD Proposal: SR 1098657 OCC (20) 3480 laptops

 noreply@salesforce.com on behalf of ProSys - Do Not Reply <prosys@...>  
 To:  Duenas, Ellen, County Counsel; **PROSYS**


 Reply
  Reply All
  Forward
 


Fri 3/8/2024 1:05 PM

 If there are problems with how this message is displayed, click here to view it in a web browser.

Please review the information below:


To approve/decline please click on this link:

**Important: Please make sure you are connected to the county VPN before you click on this link**

<https://prosys.acgov.org/Approver/ApproverAction?id=a3L6T000004kwCnUAI&did=a3F6T00000CUYDBUA5&StepId=a3J6T000004j1GsUAI&F=0>


Proposal No:	PR-000322
UR#:	1098657
Proposal Name:	SR 1098657 OCC (20) 3480 laptops
Requestor:	Ellen Duenas
Project Manager:	Sean Pangilinan
ITD Account Manager:	Menaka Indrani
Agency/Department Name:	County Counsel
Team:	Client Services
Description:	
Executive Summary:	OCC will provide funds for this request. OCC will own the equipment. ITD will procure, install, configure and support the purchased equipment. ITD will work with the vendor to quickly replace any equipment damaged in shipment or any defective equipment still under the manufacturer's warranty.
Goals/Objectives:	
Notes:	
Board Letter Required:	true
<b>Total Budget Adjustment Current FY:</b>	<b>\$26,492.30</b>
<b>Total Budget Adjustment Next FY:</b>	<b>\$0.00</b>

Search Proposals screen for Departments:


ITD Proposal Management
Approval Requests


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### Search Proposal

UR/SR #	<input type="text" value="Equal"/>	<input type="text"/>
Proposal Title	<input type="text" value="Like"/>	<input type="text"/>
Board Meeting Date	<input type="text" value="Equal"/>	<input type="text" value="mm/dd/yyyy"/> 
Department Name	<input type="text" value="Equal"/>	<input type="text" value="Public Health"/>
Status	<input type="text" value="Equal"/>	<input type="text" value="All"/>
Requestor Name	<input type="text" value="Like"/>	<input type="text"/>

Search

View/Approve proposal screen for Departments:


ITD Proposal Management
Approval Requests

Approve
Decline

Proposal	Proposal Items	Attached Files	Roles And Responsibilities	Approvers
Proposal Number	<input type="text" value="PR-000330"/>			
Proposal Title	<input type="text" value="Staff Aug Proposal Ext. Daisy Gomez"/>			
Proposal Status	<input type="text" value="Pending Client Approval"/>			
UR #	<input type="text" value="1098888"/>			
Board Meeting Date	<input type="text"/>			
Current Fiscal Year	<input type="text" value="2023-2024"/>			
Board Letter required	<input type="text" value="Yes"/>			
Need Client Approval	<input type="text" value="Yes"/>			
Created By Name	<input type="text" value="Bea Yutuc"/>			
Created By Email	<input type="text" value="bealorraine.yutuc@acgov.org"/>			
ITD Account Manager	<input type="text" value="Menaka Indrani"/>			
Project Manager	<input type="text" value="Menaka Indrani"/>			
Presenter	<input type="text" value="Project Manager"/>			
Requestor Name	<input type="text" value="Jennifer Wong"/>			
Out of Scope	<input type="text"/>			

# PROSYS DEPARTMENT USER MANUAL

## Department screen: Provide Accounting Information Screen

Proposal
Proposal Items
Attached Files
Roles And Responsibilities
Approvers

[Hide Account Details](#)

### Account Details

Org#

Fund#

Program#

Project Grant

Apply To All Items
Apply To Selected Items

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### Proposal Item Details

Proposal Current FY: 2023-2024
Proposal Next FY: 2024-2025

Proposal Items requiring Budget Adjustments

Export to Excel

	Item Name	Agency/Dept Name	Charge Type	Quantity	Unit Cost	Description	Total Cost	One Time Annual Charges Current FY	Recurring Annual Charges Current FY	Total Budget Current FY
<input type="checkbox"/>	Jabra 75SE headsets	OAD	One Time	3	\$100.00	EVOLVE 75 SE, LINK380A MS STEREO	\$300.00	\$300.00	\$0.00	\$300.00
<input type="checkbox"/>	Taxes and Fees	OAD	One Time	1	\$67.53		\$67.53	\$67.53	\$0.00	\$67.53

## Department Approver Dashboard:

ITD Proposal Management
Welcome Ibusuoc

### Proposals Pending My Approval

Actions	UR#	Department N...	Proposal Title	Status	Board Letter required	Total Budget Adjust... Current FY	Total Budget Adjust... Next FY	Requestor Name
<a href="#">Approve/Decline</a>	1290876	Test	Test* Library	Pending Client Approval	Yes	\$1,000.00	\$0.00	viji
<a href="#">Approve/Decline</a>	343430	Test	Build website for Test* Agency	Pending Client Approval	Yes	\$2,000.00	\$0.00	Laura B
<a href="#">Approve/Decline</a>	7878787	Test	Test* Purchase Equipment	Pending Client Approval	Yes	\$6,200.00	\$3,400.00	John Doe