Technology and Software Procurement and Payment Workflows

Foothill – De Anza Community College District
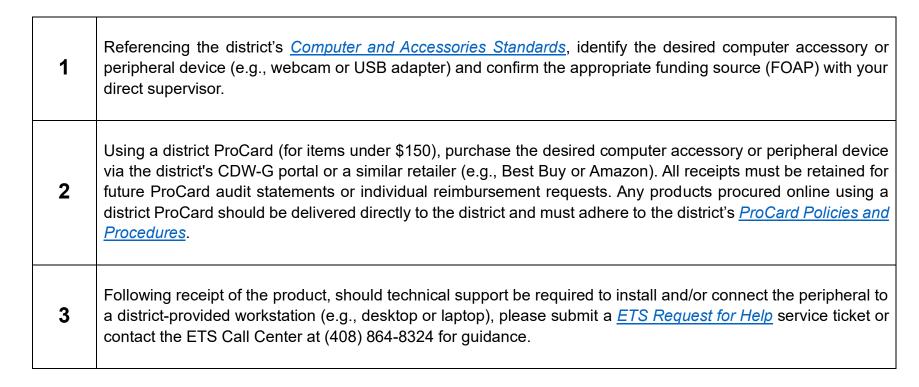
Purpose

The purpose of the *Technology and Software Procurement and Payment Workflows* document is to provide Foothill-De Anza Community College District personnel with a reference guide for the procurement and payment of technology (including, but not limited to, computer accessories and peripherals, instructional devices, and other non-districtwide software). This document is intended to reinforce cross-functional collaboration and support existing guidance and procedural recommendations from Educational Technology Services (ETS), Business Services, and Purchasing, Contracts and Risk Management. Note that these workflows are separate from the procurement of new workstation devices (e.g., desktops or laptops) for employees, departmental shared spaces (e.g., service desks), and/or student computer labs. Those processes can be found on the *ETS District Standards* web page.

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Employee Computer Accessories and Peripheral Devices (Under $150)

This workflow is for the procurement of individual computer accessories or peripheral devices for employees. This workflow is <u>not</u> for bulk technology procurements, even if the individual unit cost is less than $150. On a case-by-case basis, approval may be requested for an item with a cost greater than $150; however, these purchases must be approved in advance by the Vice Chancellor of Technology.

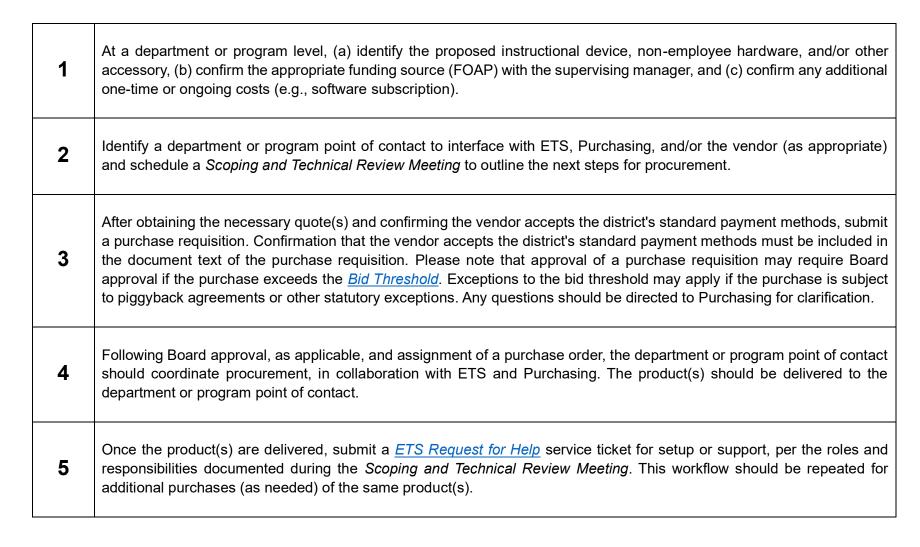|	
1	Referencing the district's *Computer and Accessories Standards*, identify the desired computer accessory or peripheral device (e.g., webcam or USB adapter) and confirm the appropriate funding source (FOAP) with your direct supervisor.
2	Using a district ProCard (for items under $150), purchase the desired computer accessory or peripheral device via the district's CDW-G portal or a similar retailer (e.g., Best Buy or Amazon). All receipts must be retained for future ProCard audit statements or individual reimbursement requests. Any products procured online using a district ProCard should be delivered directly to the district and must adhere to the district's *ProCard Policies and Procedures*.
3	Following receipt of the product, should technical support be required to install and/or connect the peripheral to a district-provided workstation (e.g., desktop or laptop), please submit a *ETS Request for Help* service ticket or contact the ETS Call Center at (408) 864-8324 for guidance.

Employee Computer Accessories and Peripheral Devices (Over $150)

This workflow is for the procurement of individual computer accessories or peripheral devices for employees. This workflow is <u>not</u> for bulk technology procurements, instructional devices (e.g., virtual reality headsets), and/or non-employee devices (e.g., wireless hotspots for students).

1	Referencing the district's *Computer and Accessories Standards*, identify the desired computer accessory or peripheral device (e.g., monitor, scanner, or docking station) and confirm the appropriate funding source (FOAP) with your direct supervisor. On a case-by-case basis, ETS may be able to provide additional guidance or recommendations as to the most appropriate accessory or peripheral.
2	Request a vendor quote for the applicable computer accessory or peripheral by submitting a *ETS Request for Help* service ticket. A vendor quote and confirmation that the vendor accepts the district's standard payment methods (purchase order with paper check issued) must be included as supporting documentation with any purchase requisition before Purchasing can move forward with the assignment of a purchase order. On a case-by-case basis, pre-approval from the Vice Chancellor of Technology may be requested for a <u>one-time</u> consumer technology purchase exceeding the $150 limit via a district ProCard. Note that this requires submission of an *Over $150 Technology Purchase Pre-Approval Request* via *ETS Request for Help* prior to completion of any purchase.
3	Once a vendor quote is received, submit a purchase requisition in Banner. Confirmation that the vendor accepts the district's standard payment methods must be included in the document text of the purchase requisition. Purchasing will then coordinate the purchase with the approved vendor(s) and schedule delivery to ETS for asset tagging.
4	Using the previously submitted *ETS Request for Help* service ticket, coordinate with ETS on the installation of the computer accessory or peripheral device in conjunction with a district-provided workstation (e.g., connecting and secure locking a second monitor).

Instructional Devices, Non-Employee Hardware, and Other Accessories

This workflow is for the procurement of individual products and/or bulk technology orders (and may require a concurrent software or service contract). The use of a district ProCard or personal credit card for such purchases is prohibited and may result in district ProCard cancelation or denial of applicable reimbursement requests.

1	At a department or program level, (a) identify the proposed instructional device, non-employee hardware, and/or other accessory, (b) confirm the appropriate funding source (FOAP) with the supervising manager, and (c) confirm any additional one-time or ongoing costs (e.g., software subscription).
2	Identify a department or program point of contact to interface with ETS, Purchasing, and/or the vendor (as appropriate) and schedule a *Scoping and Technical Review Meeting* to outline the next steps for procurement.
3	After obtaining the necessary quote(s) and confirming the vendor accepts the district's standard payment methods, submit a purchase requisition. Confirmation that the vendor accepts the district's standard payment methods must be included in the document text of the purchase requisition. Please note that approval of a purchase requisition may require Board approval if the purchase exceeds the *Bid Threshold*. Exceptions to the bid threshold may apply if the purchase is subject to piggyback agreements or other statutory exceptions. Any questions should be directed to Purchasing for clarification.
4	Following Board approval, as applicable, and assignment of a purchase order, the department or program point of contact should coordinate procurement, in collaboration with ETS and Purchasing. The product(s) should be delivered to the department or program point of contact.
5	Once the product(s) are delivered, submit a *ETS Request for Help* service ticket for setup or support, per the roles and responsibilities documented during the *Scoping and Technical Review Meeting*. This workflow should be repeated for additional purchases (as needed) of the same product(s).

Non-Districtwide Software and Other Instructional Technology

This workflow is for software licenses or subscriptions not already available districtwide (i.e., department or division specific software) and/or the procurement of other instructional technology services which may require a licensing contract or agreement for services. This workflow is for new agreements as well as renewals.

1	At a department or program level, (a) determine the proposed software and/or instructional technology, (b) identify the appropriate funding source (FOAP), (c) confirm any additional one-time or ongoing costs (e.g., implementation professional services or maintenance), and (d) determine the applicable service period (e.g., single or multi-year).
2	Identify a point of contact to interface with ETS, Purchasing, and the vendor (as appropriate) and schedule a *Scoping and Technical Review Meeting* to outline the next steps for procurement.
3	After obtaining the necessary quote(s), confirming the vendor accepts the district's standard payment methods, and finalizing the terms and conditions of the licensing or agreement for services with ETS and Purchasing (as applicable), submit a purchase requisition. Confirmation the vendor accepts the district's standard payment methods must be included in the document text. Please note that approval of a purchase requisition may require Board approval purchase exceeds the *Bid Threshold*. Exceptions to the bid threshold may apply if the purchase is subject to piggyback agreements or other statutory exceptions. Any questions should be directed to Purchasing for clarification.
4	Following Board approval, as applicable, execution of the licensing or service agreement, and assignment of a purchase order, the department or program point of contact should coordinate start-of-service, in collaboration with ETS.
5	Once the software or service becomes available, a *ETS Request for Help* service ticket for setup or support may be submitted, per the roles and responsibilities documented during the *Scoping and Technical Review Meeting*.

Workflow References and Links to District Resources

Scoping and Technical Review Meeting

The purpose of this meeting is to review (a) the proposed product or software, (b) the scope of work and intended use, (c) the proposed quantity, cost, service period (e.g., multi-year), and approvals required, (d) the roles and responsibilities for ordering, setup, configuration, and/or ongoing support, (e) the vendor's information security practices (e.g., data security and compliance, privacy statements, third-party security assessment, etc.), and (f) accessibility compliance (e.g., VPAT, third-party review, etc.). Please note that no-cost instructional software still requires a pre-deployment review.

ETS District Standards

https://ets.fhda.edu/policies-and-procedures/standards/index.html

Computer and Accessories Standards

https://ets.fhda.edu/policies-and-procedures/standards-policy.html

ProCard Policies and Procedures

https://business.fhda.edu/policies-and-procedures/e-procard-policies-and-procedures.html

ETS Request for Help

https://helpdesk.fhda.edu/ or ETS Call Center (408) 864-8324

Purchasing, Contracts, and Risk Management

https://purchasing.fhda.edu/

Bid Threshold

https://purchasing.fhda.edu/bid-threshold/index.html

Over $150 Technology Purchase Pre-Approval Request

https://helpdesk.fhda.edu/, select *Request a Service,* then select *Over $150 Technology Purchase Pre-Approval Request*