New (or Renewal) Software Request Process

Step 1: New or Renewal Software Customer Request
Customer completes the New (or Renewal) Software Request Form (also includes Sofware-as-a-Service). Upon submitting of this form, a Tracker ticket is created in the ITS Service Center ("ITSSC") project queue. **NOTE**: Until the completed New or Renewal Software Application Request Form is received, procurements or renewals cannot be processed.

Step 2: ITS Service Center Review
The ITSSC receives a completed request via Tracker ticket and then performs a technical, compatibility, and solutions analysis to ensure the software can be supported with in the existing Fredonia computing environment, or recommends / determines if similar software already exists utilizing the University Approved Software List. Furthermore, the ITSSC identifies what ITS resources are required to provide support. If ITSSC needs to create a quote, they work with the customer and the vendor to complete this process. Tracker ticket "Watchers" include the Director of the ITSSC, ITSSC Coordinator, and primary ITSSC Tech assigned to the area.
- If all above is approved, ITSSC updates the Tracker ticket with proper information and forwards to Information Security Office's ("ISO") queue for the required security risk assessment.
- If any of the above is not approved, the ITSSC informs the customer and closes ticket. **NOTE**: All software must be approved by the requestors Director, Dean, or Departmental chair as for possible ongoing financial commitments and permission to possibly utilize University regulated data (Cat - II & III).
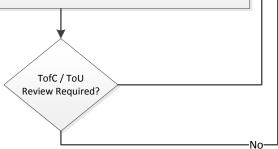
Step 3: Information Security Review
The Information Security Office ("ISO") will perform an Information Security risk assessment to ensure that the software is secure and meets regulatory requirements.
- If review passes, ISO updates Tracker ticket with proper information and changes assignee to Purchasing's Tracker project queue.
- If the security review fails, the ISO will inform the customer and then close the ticket.
- If the ISO believes this software / system requires an ITS project charter, the ISO will move the ticket to the CIO to work in parallel with the Project Management Office ("PMO") to have a Project Charter created.
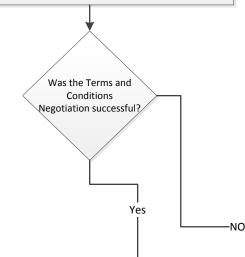
Step 4: Procurement Review
Upon the reassignment of the Tracker ticket to the Purchasing Department ("PD"), the PD will determine if a Terms and Conditions (TofC) / Terms of Use (ToU) contract review is required.

TofC / ToU Review Required?

Step 4a: Software Terms and Conditions Review
If necessary, the PD will update the Tracker ticket and moves it into the Contract Services project queue for TofC / TofU negotiation. The Contract Services team will be added as a Watchers to the Tracker Ticket and perform their review.

Was the Terms and Conditions Negotiation successful?

Step 4b: Ticket is Updated
CS will update the Tracker ticket and include documentation illustrating the TofC / TofU was successfully negotiated (e.g. signed contract). Contract Services moves the Tracker ticket back into the PD's project queue for procurement processing.

Step 5: Procurement Processing
The PD facilitates the Purchase Order (PO) generation from approvals found within Tracker and sends to customer. The PD updates Tracker ticket by attaching the PDF of PO. The PD moves the ticket back to ITSSC project queue. The ISO updates the University Approved Software List and the ITSSC notifies the primary service manager from ITS to complete a new ITS Service Catalog Entry (if applicable).

NOTE: If a "Local Business Decision" needs to be made as to procure the software, the CIO and the VP of Finance and Admin need to jointly approve.

Step 6: Software Installation and License Registration
The ITSSC or designated ITS department (defined within the project charter and/or Tracker Ticket) receives and installs, configures, or integrates software and notifies the customer.

Step 5: Terms and Conditions Negotiation unsuccessful
Contract Services will update the Tracker ticket and inform ITS and the customer that the TofC / TofU negotiation was unsuccessful and software can not be procured. The Contract Services team will move the ticket to ITSSC project que. The ITSSC informs the customer and helps to determine if an alternative solution exists.

Ticket is closed and archived for possible future reference

Additional Information
- This New or Renewal Software Request Process is required by SUNY, NYS and Federal regulations.
- All software procurements or renewals must follow this process regardless of the type funding (State vs. Non-state).
- Software or Software as a Service (SaaS) cannot be purchased via a state issued procurement card and must be purchased via a state issued Purchase Order.
- This Software Request Process can take up to 6 months to complete.
- All terms & conditions, terms of use, terms of the agreement, end user license agreement, etc must be reviewed and approved by the Director of Contract Services or the Director of University Services.
- All software that uses University data must be approved by the Information Security Officer or designee and be added to the University Approved Software List.
- All Software licenses need to be registered using the ITS.ServiceCenter@fredonia.edu email account.

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