

# Fredonia Technology Request Process

**Step 1: Technology Request Process**  
 Customer completes the Technology Request Form. Upon submission of this form, a Tracker ticket will be created in the ITSCIO's Tracker queue.

**NOTE:** Until the completed Technology Request Form is completed, no technology will be procured. This includes but is not limited to software, hardware, services, or "X"-as-a-service solutions.

**Step 1a: Ticket is Updated**  
 CIO receives request via tracker ticket, determines if the initiative is more than just a software purchase if and a project charter is needed and a project manager assigned

**Charter?**

**Step 1b:** PM assigned and project follows PMO process found at <http://www.fredonia.edu/its/pmo>. This will include coordinating with the ITSSC, ISO, Purchasing, Contract Management by using this tracker ticket and various ITIL forms, etc. Tracker ticket assigned to PM.

**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 technology 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.

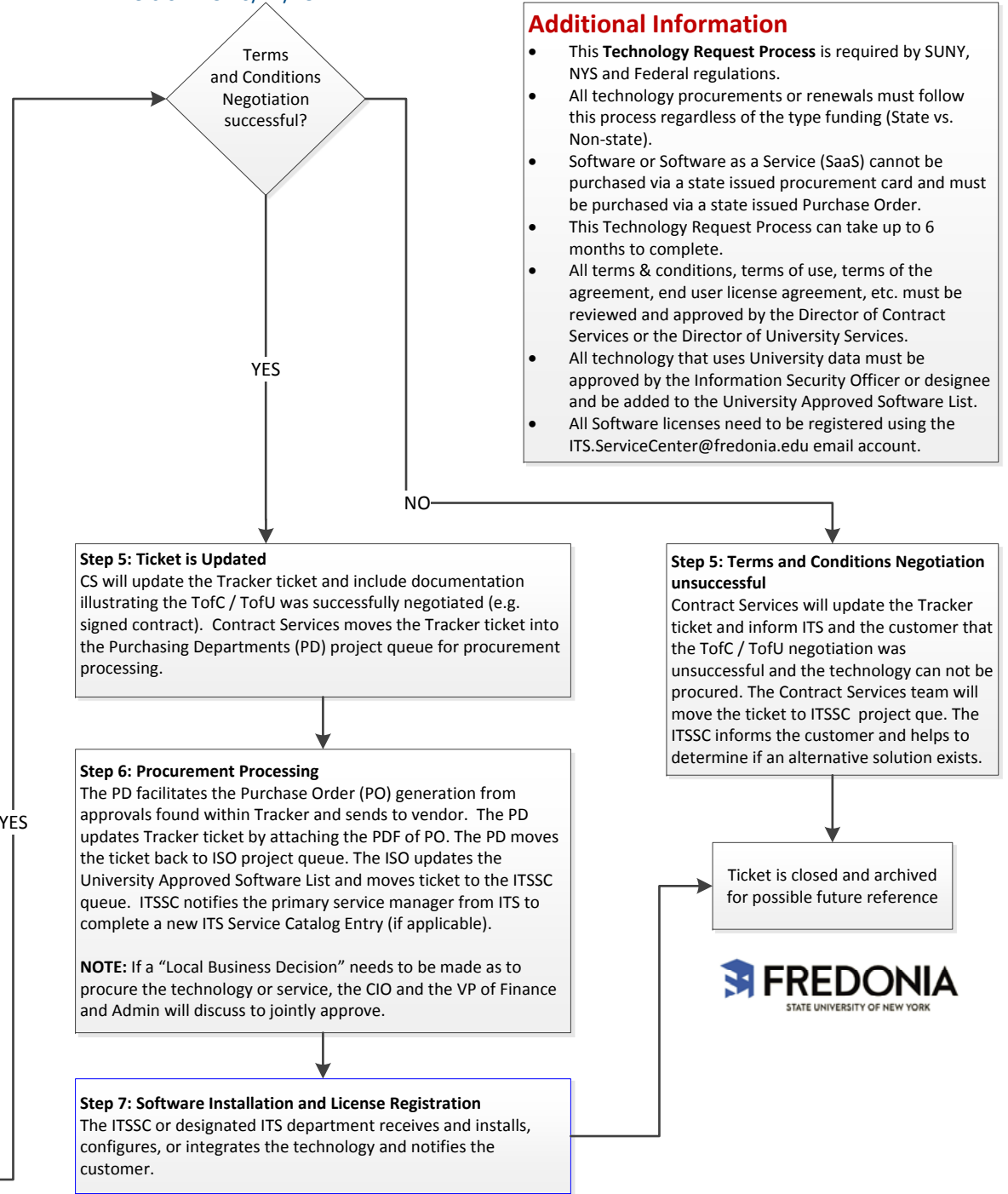
**NOTE:** All software must be approved by the requestors Director, Dean, or Departmental chair as for possible ongoing financial commitments and permission to possibly utilize University regulated data (Cat - II & III).

**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.

**Step 4: Procurement Review**  
 Tracker ticket is placed into the Contract Managements (CM) Tracker queue for a Terms and Conditions (TofC) / Terms of Use (ToU) contract review, negotiation, and/ or verification.

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- Additional Information**
- This **Technology Request Process** is required by SUNY, NYS and Federal regulations.
  - All technology 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 Technology 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 technology 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](mailto:ITS.ServiceCenter@fredonia.edu) email account.

