

LCIS Software/Hardware Purchasing and Installation Guidelines

Use this guide for suggestions on the steps needed to purchase new software or hardware and submit a request to have them installed.

- Determine your software needs and secure a quote from your chosen vendor or you may ask LCIS for assistance in securing your quote for standard software and hardware.
- Forward your quote to LCIS for review. If the purchase falls under LCIS standard equipment, a checklist will be returned to you. Attach the checklist and your quote to your requisition and process.
- If the hardware or software does not fall under LCIS standard equipment the purchase request may need to be reviewed and approved by the Data Processing Board. Please review the attached IT Procurement Policy for guidelines.
- When the purchase order is issued, forward a copy of the purchase order (or invoice), along with the Software or Hardware installation form to LCIS Help Desk with a request to have the installation completed. A work order will be created for your request. See below for required information on the PO or invoice. Software will not be installed without license proof of purchase.
- LCIS technical staff will schedule an appointment to complete the installation for you.
- It is highly recommended that you use the attached Software Tracking Spreadsheet to keep a record of all software licenses purchased and installed for your department. This form may be required for certain software installations to show the quantity of licenses purchased and who those licenses are assigned to.

Purchase Order or Invoice is your proof of license purchase for software. These documents must include the following information:

- Specific name of software being purchased (Standard, Pro, etc.)
- Version of software (year)
- Quantity of licenses purchased

Attachments:

- Software Installation Request Form
- Hardware Installation Request Form
- Software Tracking Spreadsheet
- Lucas County IT Procurement Policy

Lucas County IT Procurement Policy
Effective 10/1/12
Revised 5/2/2013

Purpose

In conjunction with ORC 307.84 regarding the Automatic Data Processing Board, the purpose of this policy is to provide further criteria for procurement of and investment in IT hardware, software and related services for all Lucas County offices, departments, and agencies under ADP Board oversight. By definition, these are any officer, department, board, commission, agency, court, or other office of the county, other than a board of county hospital trustees.

Policy

- A. Hardware/Software/IT services procurement under \$7,500 only requires informal review by Lucas County Information Services. The Checklist for Hardware/Software/Services will be completed by LCIS management prior to procurement initiation from the requesting county office, department, or agency. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- B. County offices, departments, or agencies requesting IT procurement of \$7,500 or more will require formal DP Board review and approval along with pricing quotations. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- C. Any and all hardware procurement which will attach to the Lucas County network must be submitted for review to Lucas County Information Services regardless of dollar value. These can include, but are not limited to PC's, monitors, printers, scanners, multi-function copiers, netbooks, tablets, and smart phones. Formal DP Board approval may be required at the discretion of LCIS management.
- D. IT software purchases of \$5,000 or more (one individual license) must be added to the capital asset base as an intangible asset as soon as the software is placed in service.
- E. IT software purchases or upgrades of \$7,500 or more must have 3 competitive quotations submitted for DP Board review unless the software provider is a sole-source or state term vendor. Purchases of \$50,000 or more must follow Lucas County purchasing policy for appropriate approvals. Exceptions to this policy are listed in the Exclusions Section at the end of this document.

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- F. Software/hardware support renewals whose original purchase date is on or after September 29, 2011 and exceeds the \$7,500 threshold must be submitted for procurement approval to the Data Processing Board. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- G. If IT procurement approval (formal or informal) is required, it must be obtained prior to creation of the vendor's purchase order.
- H. All compliance to Lucas County's general purchasing policies and practices will apply.

Exclusions

The following items are excluded from Data Processing Board review and formal approval (LCIS approval and Procurement Checklist still required):

- Any and all hardware and software purchases or leases which comply with the technology standards set by Lucas County Information Services management. These include but are not limited to Microsoft Office, PC's, laptops, monitors, printers, scanners, multi-function copiers, netbooks, tablets, and smart phones.

The following items are excluded from LCIS review and approval. (No approval required):

- Any and all hardware purchases or leases which will **not** connect to the Lucas County network.
- Any and all hardware or software purchases or leases which do **not** require involvement of Lucas County Information Services to install or maintain.
- Software/hardware support renewals on IT purchases on or after September 29, 2011 that are Ohio state term contract or sole source providers.
- Software/hardware support renewals on IT purchases prior to September 29, 2011.