

Technology & Software Procurement Workflows

Foothill – De Anza Community College District

Purpose

The purpose of the *Technology & Software Procurement Workflows* document is to provide Foothill College, De Anza College, and Central Services personnel with a reference guide for the procurement 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 the Educational Technology Services (ETS), Business Services, and Purchasing, Contracts & Risk Management departments. 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.

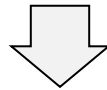
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Employee Computer Accessories and Peripheral Devices (Under \$150)

This workflow should be referenced for the procurement of individual computer accessories or peripheral devices for employees. It should not be referenced 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.

Referencing the district's *Computer 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.



Using a district ProCard (or personal credit card, as approved by Business Services), 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 ProCard Rules and Procedures*.



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* ticket or contact the ETS Call Center for guidance.

Employee Computer Accessories and Peripheral Devices (Over \$150)

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

Referencing the district's *Computer 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.



Request a vendor quote for the applicable computer accessory or peripheral by submitting a *ETS Request for Help* ticket. A vendor quote must be included as supporting documentation with any purchase requisition before Purchasing can move forward with the assignment of a purchase order.



Once a vendor quote is received, submit a purchase requisition in Banner. Purchasing will then coordinate the purchase with the approved vendor(s) and schedule delivery to ETS for asset tagging.



Using the previously submitted *ETS Request for Help* 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 should be referenced 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, without prior approval, may be deemed a violation of the district ProCard policy or result in denial of an applicable reimbursement request.

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).



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* with ETS.



Coordinate with ETS and Purchasing to obtain the necessary quote(s) and approval for procurement with the vendor by submitting a purchase requisition. Depending on the dollar amount, this step may require Board ratification/approval, per the *District Purchasing Procedures, Policies, and Laws*.



Following Board ratification/approval 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.



Once the product(s) are delivered, submit a *ETS Request for Help* 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 should be referenced for licensing of software not already available via districtwide license (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 should be referenced for new agreements and renewals.

At a department or program level, (a) determine the proposed software and/or instructional technology, (b) identify the appropriate funding source (FOAP), and (c) confirm any additional one-time or ongoing costs (e.g., implementation professional services or maintenance).



Identify a point of contact to interface with ETS, Purchasing, and the vendor (as appropriate) and schedule a *Scoping and Technical Review Meeting* with ETS.



Coordinate with ETS and Purchasing to obtain the necessary quote(s) and approval for procurement with the vendor by submitting a purchase requisition. As applicable, this may require finalizing the terms and conditions of the licensing or service agreement. Depending on the dollar amount, this step may require Board ratification/approval, per the *District Purchasing Procedures, Policies, and Laws*.



Following Board ratification/approval, execution of the licensing or service agreement (as applicable), and assignment of a purchase order, the department or program point of contact should coordinate start-of-service, in collaboration with ETS.



Once the software or service becomes available, a *ETS Request for Help* ticket for setup or support may be submitted, per the roles and responsibilities documented during the scoping and technical review meeting. This workflow should be repeated for any renewals.

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, and configuration (including, but not limited to, user and network access), (e) the roles and responsibilities for ongoing support (either technical or functional), (f) the vendor's information security practices (e.g., data security and compliance, privacy statements, third-party security assessment, etc.), and (g) compliance with current accessibility standards (e.g., VPAT, third-party review, etc.). Any no-cost instructional software still requires a pre-deployment review.

ETS District Standards

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

Computer Accessories Standards

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

District ProCard Rules and Procedures

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

ETS Request for Help

<https://etshelp.fhda.edu/> or ETS Call Center 408-864-8324

District Purchasing Procedures, Policies, and Laws

<https://purchasing.fhda.edu/procedures-policies-and-laws/index.html>