



Software Purchase Policy

Background

The University's Institutional Security Standard (ISS), Institutional Risk Survey (IRS) and Information Security Control Requirements (ISCR) seek to assure and document that activities associated with the procurement of technology-related software products and information services provide contractual requirements for information security. OSU Marion is committed to obtaining a level of "managed and measurable control" for these procurement activities and created this Software Purchase Process to assure we meet this control level.

- The Marion Information Technology Strategic Planning Committee (ITSP) provides oversight of the purchase of software not provided through the University.
- Faculty and staff requesting specialized software may initiate that request through the Marion's Information Technology (IT) team or ITSP.
- ITSP will review the request and recommend or not recommend its purchase, or in some cases, may delegate recommendation to the Marion IT team.
- Marion's IT team will review software requests for alignment with the OSU Software acquisition guidelines.
- The Business Office (OFBS) will review software purchases for compliance with OSU Expenditure and Purchasing Policy guidelines.

Policy and Practice:

- No software products or information services purchases will be processed as reimbursements. Software products or information services must be procured through the normal OSU procurement processes and procedures.
- OSU Purchase orders will be the preferred purchasing methods for technology-related software products or information services and will include with the appropriate OSU terms and conditions for such purchases. OFBS will confirm that the vendor will accept purchase orders.
- Purchasing card (Pcards) will be used for software or information service purchases when the vendor indicates in writing that it will not accept a Purchase Order or only accepts credit card payments. OFBS will make a reasonable attempt to secure this written confirmation from the vendor. When unable to secure the confirmation or the vendor refuses to accept a purchase order, OFBS will move forward with the Pcard purchase.
- The purchase default for renewable software/services will be a one year purchase option unless approved otherwise by ITSP.
- Renewal of the existing license/service is dependent not only on the funding available, but also on the usage patterns. Marion's IT team will review requests for renewals taking into account the OSU Software acquisition guidelines detailed in the OSU OIT Software Life-Cycle

Management Guide <https://ocio.osu.edu/sites/default/files/assets/Software/life-cycle-mgmt-guide.pdf>

- Submission of an eRequest is required to initiate a software/service purchase.

After department approval (eRequest approver 1) is received, the eRequests will be forwarded using the ad hoc approver function by Marion's Office of Business and Finance (OFBS) to IT.

IT approval of the eRequest indicates ITSP and IT approval.

Approved eRequests will be routed through the normal OFBS processes.

Denied eRequests are routed back to the initiator. The comments field will provide information about why the request was not approved.

Questions about denied requests should be directed to the individual whose name is attached to the eRequest comments.

Guiding Documents

OSU Information Security Standard (ISS) <https://cybersecurity.osu.edu/system/files/osu.iss.v1.5.pdf>

OSU Information Security Control Requirements (ISCR)

<https://cybersecurity.osu.edu/system/files/osu.iscr.v1.5.2.pdf>

OSU Information Risk Survey (IRS) <https://cybersecurity.osu.edu/system/files/osu.iscr.v1.5.2.pdf>

OSU Purchasing Policy https://busfin.osu.edu/sites/default/files/221_purchasing.pdf

OSU Expenditure Policy https://busfin.osu.edu/sites/default/files/411_expenditures.pdf

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