

How to buy – Software and Software Subscriptions

Purpose:

This document sets forth the processes of how to buy software/software subscriptions. Moving forward, all software/software subscriptions will be submitted to procurement via a requisition. A PO must always be created for payment to be facilitated, even if the supplier does not require a PO. Note: A PCard is not an authorized payment form for software. This process is consistent for software purchases at other research forward universities.

Advantages:

- Allows UTech the ability to vet for security purposes including single sign on.
- Allows UTech the ability to verify the digital accessibility of the software. Accessibility ensures that all people—regardless of ability—can interact with the information or services you are procuring. Visit case.edu/accessibility regarding these requirements.
- Provides UTech and Procurement visibility to all software subscriptions across campus.
- Procurement and UTech can redirect end-users (where appropriate) to similar software that is already available from a preferred supplier or more cost effective.
- University can negotiate better terms by centralizing subscriptions across campus for some suppliers if applicable based on volume.
- Ensures compliance with university policy on auto renewal – when a credit card is payment method and purchase is made online, we can accommodate this need with a preloaded credit card for 12 months of services.
- In special circumstances, procurement can ensure continuity of services with a variety of payment methods.

Steps: How to Buy Software

1. If request is for a new supplier (or previous PCard purchase), requester emails procurement with software subscription information. Reminder: Software is no longer allowed to be purchased on a PCard.
 - a. Procurement works with UTech to determine if there is an alternate solution with an existing supplier.
 - i. If yes, procurement communicates this back to requester to further explore alternate supplier.
 - ii. If no, procurement communicates to requester to move forward with supplier set up with Customer Care Team.
2. If software subscription is for an existing supplier or an approved new supplier, a requisition needs to be submitted via PeopleSoft.



3. The following must be attached to the requisition:
 - a. Supplier's current Terms and Conditions (no links) in an editable format (e.g. Word)
 - b. A Voluntary Product Accessibility Template (VPAT) provided by the supplier . A VPAT is a self-disclosing document which evaluates how accessible a particular product is according to the Section 508 Standards. This link <https://case.edu/accessibility/what-accessibility> has details on university accessibility standards. **Important: If this documentation cannot be provided by the supplier, it must be noted on the requisition. NOTE: This is for NEW and RENEWAL requests.**
 - c. Any documentation that requires University signatures.
 - d. Bids and/or required documentation per the Procurement Policy
 - e. Product Quote:
 - i. Note: Specific to software – in some cases a supplier will only provide an invoice or requester will need to create an online screenshot containing price and supplier information. This kind of documentation is only acceptable if the supplier will not provide a formal written quote OR if ordering software online is the only option (no invoice or quote will be provided)
4. In some cases (specific only to software) when a supplier will only accept a credit card as payment method, this will need to be clearly noted on the requisition for approval prior to PO creation.
5. Once the requisition is submitted, it will go through further review by UTech and procurement. If signatures are required, the req will also further route through contracts prior to PO creation.
6. When procurement creates/dispatches a PO:
 - a. Quote: If a quote is attached, Procurement will email a copy of PO and quote to requester and supplier.
 - b. Invoice: If the invoice is attached, Procurement will forward invoice with PO to invoices-pds@case.edu to facilitate payment.
 - c. In rare cases where immediate payment is necessary, procurement will email to facilitate immediate payment.
 - i. End-user name/email included to Immediate Pay so one-time credit card information can be sent directly to end user if online purchase is required (only option).
 - ii. End user will then be able to purchase software from supplier site with one-time credit card information.

End Process.

