# Agency Purchasing Processes

## Overview

The ITS Procurement Team requests quotes and processes purchases orders on behalf of agency customers where it makes sense and ITS Procurement adds value by being involved. This allows agency customers to leverage ITS vendor contracts and facilitates the efficient delivery, configuration, and deployment of agency assets.

This document outlines our purchasing workflows, roles, and responsibilities for the various types of IT-related purchases and renewals ITS and Agencies may execute.

## RENEWALS

### 1. Software* and Hardware Maintenance/Licenses

Where ITS can add value, ITS may process software renewals and hardware maintenance/license renewals on behalf of agency customers.**

| ROLE | RESPONSIBILITY |
|---|---|
| *For Software Purchases only:* ITS Service Delivery Manager or ITS Procurement Team | Verify software has been vetted and is an approved solution |
| ITS Procurement Team | Request renewal quote |
| ITS (or Agency) SME | Validate quote |
| ITS Procurement Team | Send validated quote to Agency approver via ServiceNow ticketing system (for single agency renewal) OR via email (for multi-agency renewal) |
| Agency Approver | Approve quote |
| ITS Procurement Team | Process and issue PO to vendor |
| ITS Procurement Team | Update Renewals Tracker *NOTE: Agencies may request "read" access to the tracker for their agency's renewals* |
| ITS Fiscal Team | Intercompany bill the agency |
| Agency Fiscal Team | Pay intercompany bill |
| ITS Fiscal Team | Receive payment from Agency and pay vendor invoice |

 * Software purchased by ITS on behalf of agencies must be approved by ITS for use. It is the responsibility of the agency to submit a Solution Vetting request ticket in ServiceNow for software that has not been approved for use prior to ITS processing a purchase on behalf of the agency.

** Exceptions where the agency may continue to process their own renewals include:
- Low-cost purchases/renewals where the agency has spending authority and retains expertise to manage a renewal (i.e. Quickbooks), or where ITS adds no value in being involved
- Agency has a purchasing contract in place and is required to issue purchase orders

# NEW PURCHASES

## 1. Software

In most cases, ITS obtains quotes and processes purchase orders on behalf of agencies for new software purchases.

In certain circumstances, such as software that is unique or specific to a single agency and does not require support by ITS, the agency may process and issue their own purchase orders.

| ROLE | RESPONSIBILITY |
|---|---|
| Agency Requester | Submit procurement request (REQ) in ServiceNow |
| ITS Procurement Team | Verify software has been vetted and is an approved solution |
| ITS Procurement Team | Generate and attach quote to ServiceNow ticket |
| Agency Approver | Approve REQ in ServiceNow |
| ITS Procurement Team | Process and issue PO to vendor |
| ITS Procurement Team | Update or add to Renewals Tracker<br>*NOTE: Agencies may request "read" access to the Tracker for their agency's renewals* |
| ITS Fiscal Team | Intercompany bill the Agency |
| Agency Fiscal Team | Pay intercompany bill |
| ITS Fiscal Team | Receive payment from Agency and pay vendor invoice |

## 2. Hardware (Endpoints):

### Laptops, Desktops, Peripherals

In most cases, ITS obtains quotes on behalf of agencies, and agencies process and issue their own purchase orders.

Roles and responsibilities are summarized here, and the **full step-by-step process** can be found at: Endpoint ordering process

| ROLE | RESPONSIBILITY |
|---|---|
| Agency Requester | Submit procurement request (REQ) in ServiceNow |
| Agency Approver | Approve REQ in ServiceNow |
| ITS Procurement Team | Generate and attach quote to ServiceNow ticket |
| Agency Requester | Follow your agency's internal procurement procedures and place the order/issue PO, then update the ServiceNow ticket to add a comment with the Agency PO number so ITS can track and receive shipment |
| ITS Procurement Team | Receive shipment, then enter asset information in ServiceNow (including attaching packing slip) and create the deployment ticket |
| ITS Deploying Team | Receive, configure, and deploy asset(s) |
| Agency Fiscal Team | Pay vendor invoice |
| Agency Fiscal Team/Agency Asset Manager | If applicable, enter the assets in your agency's inventory system. |

| | NOTE: The owning Agency is responsible for updating and maintaining their inventory system (regardless of whether ITS issued the purchase order on the agency's behalf) |
|---|---|

## 3. Hardware (Non-Endpoints):

### Memory, Storage, Network Hardware, Server/Storage Hardware, etc.

In most cases, ITS obtains quotes on behalf of agencies, and agencies process and issue their own purchase orders for non-endpoint purchases.

In certain circumstances, such as a large deployment being handled by ITS through a Mission or Project, ITS may process a non-endpoint hardware purchase on behalf of an agency.

| ROLE | RESPONSIBILITY |
|---|---|
| ITS Operations Team and/or Enterprise Architecture Team | Request and validate quote on behalf of agency |
| ITS Operations Team and/or Enterprise Architecture Team | Submit procurement request (REQ) in ServiceNow on behalf of agency, attach the quote and select the agency approver |
| Agency Approver | Approve REQ in ServiceNow |

Once a ServiceNow REQ is approved by the agency, the steps may differ depending on whether the agency is processing the purchase, or ITS is.

These steps are outlined as follows:

### Agency Purchase:

| ROLE | RESPONSIBILITY |
|---|---|
| Agency | Follow agency's internal procurement procedures and place the order/issue PO, then update the ServiceNow ticket to add a comment with the Agency PO number so ITS can track and receive |
| ITS Procurement Team | Receive shipment, then enter asset information in ServiceNow (including attaching packing slip) and create the deployment ticket |
| ITS Deploying Team | Receives, configures (if applicable), and deploys assets |
| Agency Fiscal Team | Pay vendor invoice |
| Agency Fiscal Team/Agency Asset Manager | If applicable, enter the assets in your agency's inventory system. NOTE: The owning Agency is responsible for updating and maintaining their inventory system (regardless of whether ITS issued the purchase order on the agency's behalf) |

### ITS Purchase on behalf of Agency:

| ROLE | RESPONSIBILITY |
|---|---|
| ITS Procurement Team | Process and issue PO to vendor |

| ITS Procurement Team | Receive shipment, then enter asset information in ServiceNow (including attaching packing slip) and create the deployment ticket |
|---|---|
| ITS Deploying Team | Receives, configures (if applicable), and deploys assets |
| ITS Fiscal Team | Intercompany bill the agency |
| Agency Fiscal Team | Pay intercompany bill |
| ITS Fiscal Team | Receive payment from agency and pay vendor invoice |
| Agency Fiscal Team/Agency Asset Manager | If applicable, enter the assets in your agency's inventory system. *NOTE: The owning Agency is responsible for updating and maintaining their inventory system (regardless of whether ITS issued the purchase order on the agency's behalf)* |